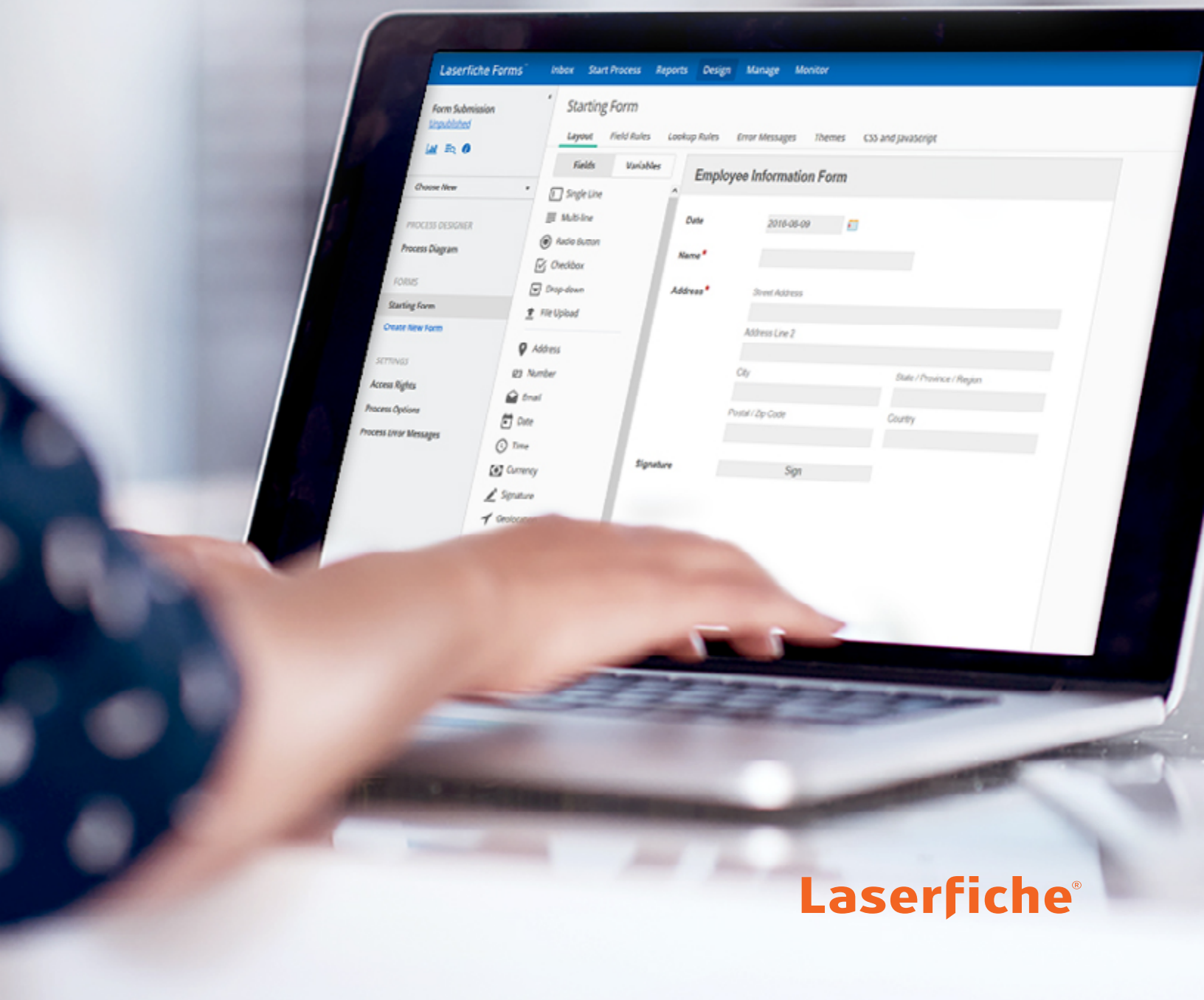
Getting Started with
Laserfiche Forms



Laserfiche®

Contents

Introduction

Welcome to Laserfiche Forms!

Welcome to Laserfiche Forms! This quick start guide will help you start using the most common Laserfiche Forms features. This guide is divided into three sections: general use, design and management. You can get more information from the additional resources listed at the end of each section. Resources marked with an asterisk (*) require a free account. You can create the free account here.

The terminology in these sections is defined at the end of the guide.

Chapter 1

Getting Started With Laserfiche Forms

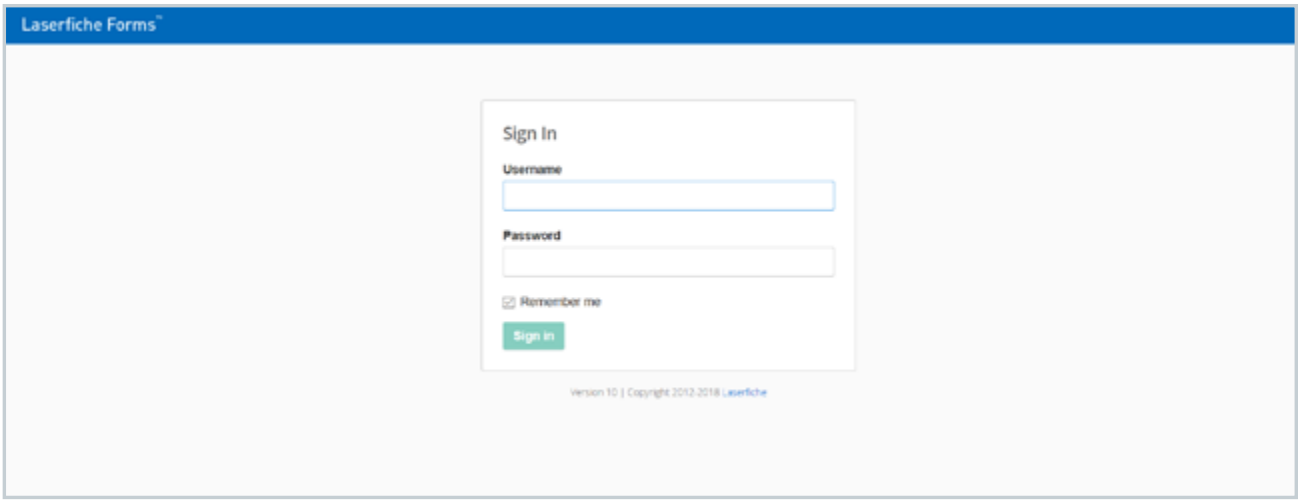
Signing in

In order to create or complete a form, you must first sign in to Laserfiche Forms.

You can sign in using one of the following methods:

- A specific username and password provided to you by your IT department
- Your Windows login credentials

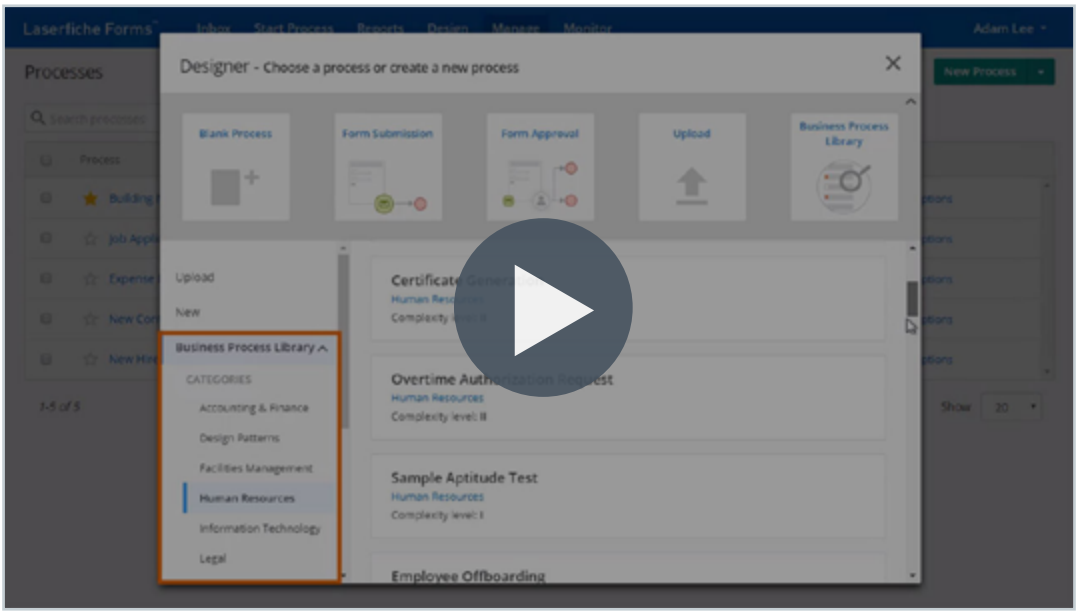
If you do not have access to Forms, contact your Laserfiche Administrator.



Signing in to Laserfiche Forms

Laserfiche Forms Overview

Laserfiche Forms gives users the ability to complete, approve, create and manage electronic forms and the activities that happen after the form is submitted. The series of activities that take place after a form is submitted make up a Forms process.



Video: Overview of Laserfiche Forms

The ability to perform these actions is determined using security roles. There are two types of roles: product-level and process-level. Product level roles apply to every process in Laserfiche Forms. Process level roles apply to a single process.

Product Level Roles

If you are a named Laserfiche user you can be assigned the role of:

- **System Administrator:** Create, modify, import, export, and delete business processes
- **Process Creator:** Can create and manage their own business processes
- **Basic User:** Cannot create business processes, but can have process-level roles that will allow them to administer business processes

Most users are going to be Basic Users or Process Creators.

Process Level Roles

System Administrators can also assign security roles on a process-by-process basis. These roles are:

- **Process Administrator:** Start, create, and modify the business process, and create reports for it. Process administrators can also reassign process tasks, edit process instance names, and cancel process instances
- **Business Manager:** These users have the same rights as Process Administrators except that they cannot edit the process or delete instances
- **Submitter:** Can start processes, either by submitting a form or by starting a process manually

The Laserfiche Forms Interface

The Forms interface is composed of two to six different tabs depending on your role. The two tabs that are available to all users are:

- **Inbox:** This is where all of the forms/tasks that you have been assigned can be completed or reviewed. The Inbox also lists all of the tasks that have been assigned to your team but not to you specifically, as well as all tasks that you have completed
- **Start Process:** Use this tab to begin processes that you have access to

If you are a Process Creator or System Administrator you will also have access to the following tabs:

- **Reports:** Create, manage and view reports, graphs and charts
- **Design:** Create business processes and electronic forms
- **Manage:** Edit existing business processes or create new ones
- **Monitor:** View details about each time a business process runs as well as all related form submissions

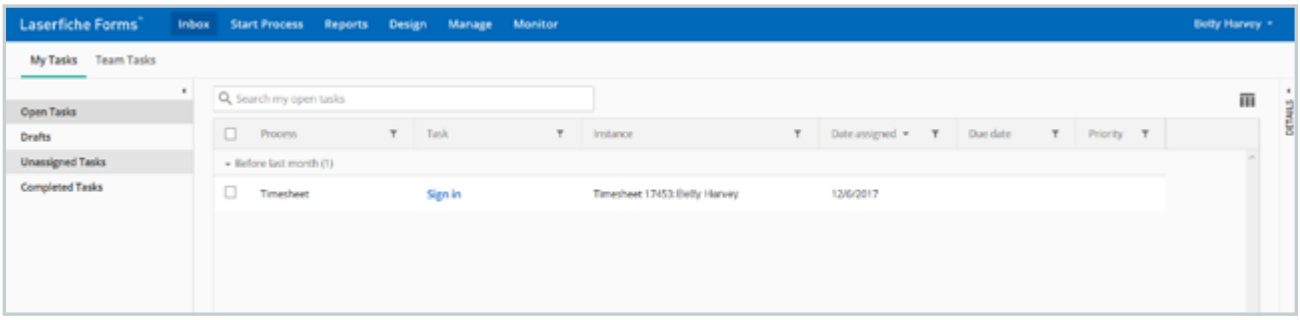
Business Managers have access to all of these tabs except the Design Tab.

The different tabs in Laserfiche Forms

Chapter 2

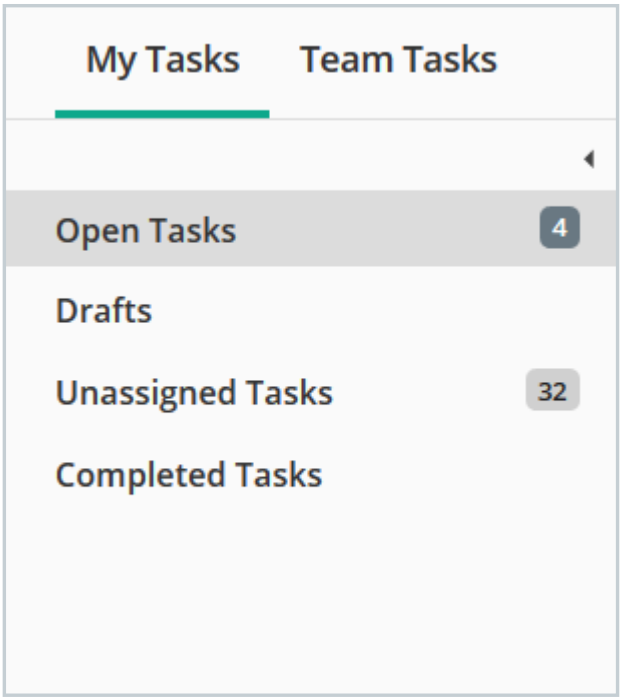
Performing Tasks and Submitting New Forms

Signing into Laserfiche Forms will take you to the Forms Inbox. This is where all of the tasks that you and your teams have been assigned will be listed. Some tasks will be forms that you will need to fill out and submit. Other tasks will be forms that you will need to review, approve, or deny. To complete a task, click the name of the task, perform the required action and submit the form.



The Laserfiche Forms Inbox

On the far left side of the screen is the Menu bar. If it is closed, select the arrow next to the word Menu.



The tasks menu showing four open tasks and 32 tasks that have been assigned to a team but not claimed by any individual team member

The Menu is composed of four tabs:

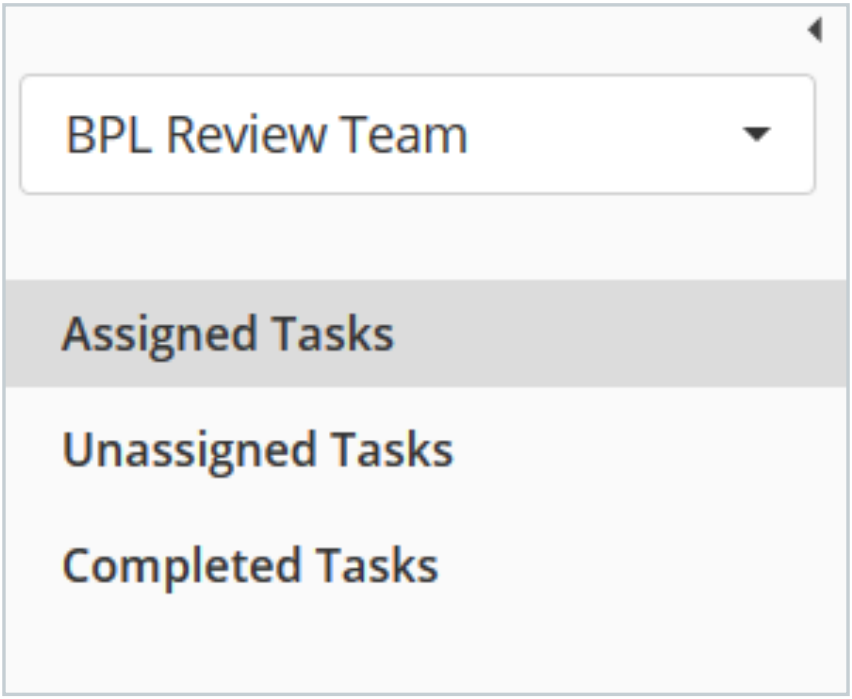
- **Open Tasks:** You will begin on this tab by default. These are tasks that you have been assigned but you have not started
- **Drafts:** While completing tasks, you have the option to save them as drafts. All tasks that you have saved will appear in this tab
- **Unassigned Tasks:** These tasks have not been assigned to any member of your team. You can elect to open the task and assign it to yourself
- **Completed Tasks:** All of the tasks that you have completed and submitted will be located here. You will not be able to change any of the tasks after submission

Each tab will display the number of tasks in the tab next to its name except for the Completed Tasks tab.

My Tasks and Team Tasks

Tasks that are assigned to you individually will appear in the My Tasks tab. It is also possible that you will have been assigned to a team by an administrator. If you have, you will also see a Team Tasks tab that lists tasks that anyone on your team can complete.

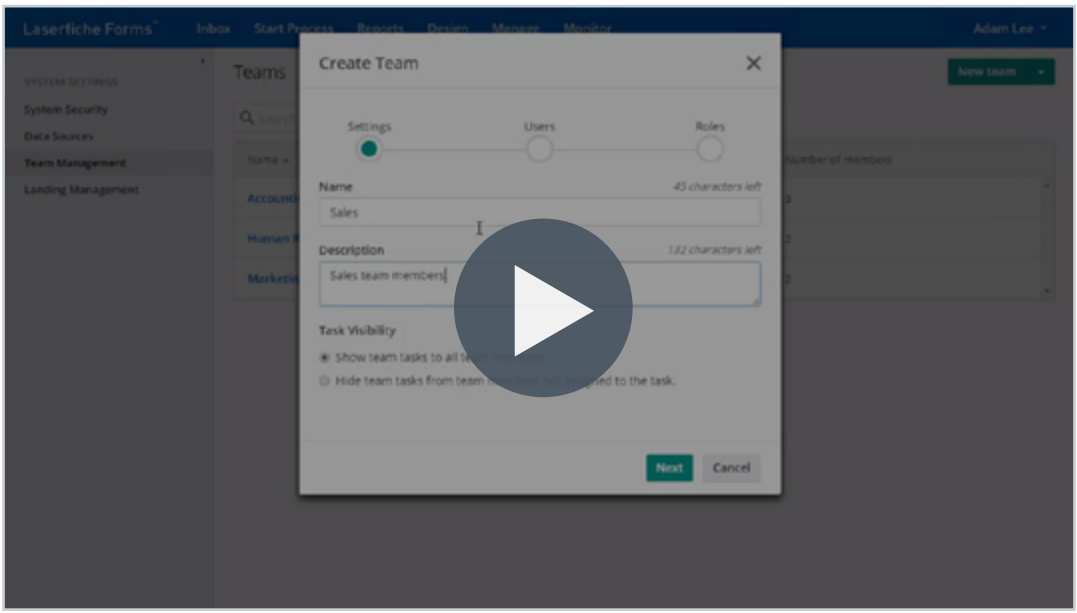
If you are a member of multiple teams, you can select which team's tasks to view by selecting the desired team in the drop down menu.



Viewing the tasks available to the BPL Review Team

To complete a team task, click on the task and then select the **Assign to Me** button in the top right corner. If you are an administrator, you can assign the task to someone on your team by selecting the task in the Inbox and clicking the **Reassign** option.

If you are an administrator, you can read the Laserfiche Forms help files to view more information on how to filter tasks based on team and role membership.

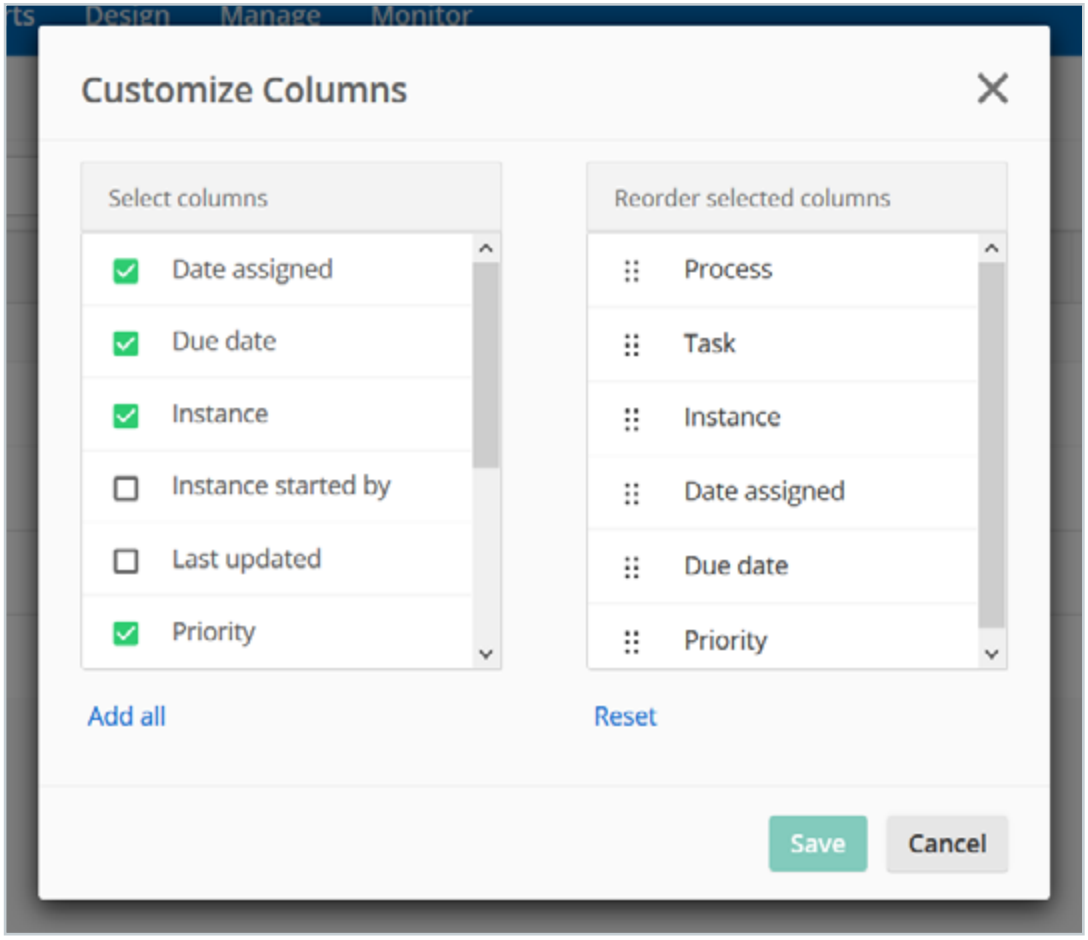


Video: Teams in Laserfiche Forms

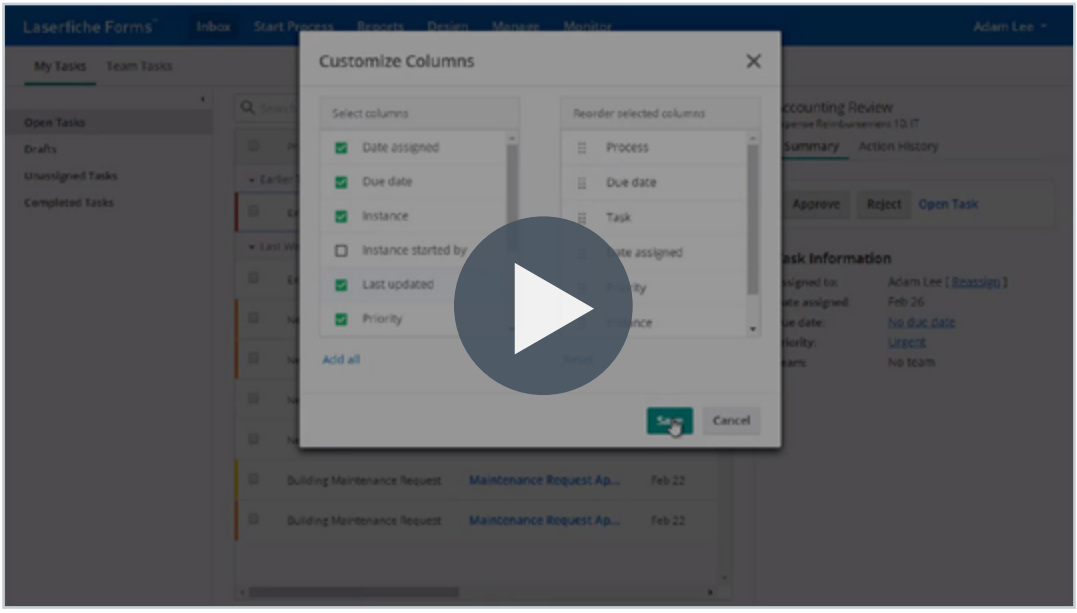
Organizing Your Tasks

By default, the tasks you have been assigned will appear in chronological order. If you know the name of a task, you can search by keyword in the search bar.

Additionally, you can sort tasks by characteristics like Process, Task or Instance. For more customized organization, click the change column display button . Clicking this button will allow you to select which columns you want displayed and to reorder them manually.



The Customize Columns menu



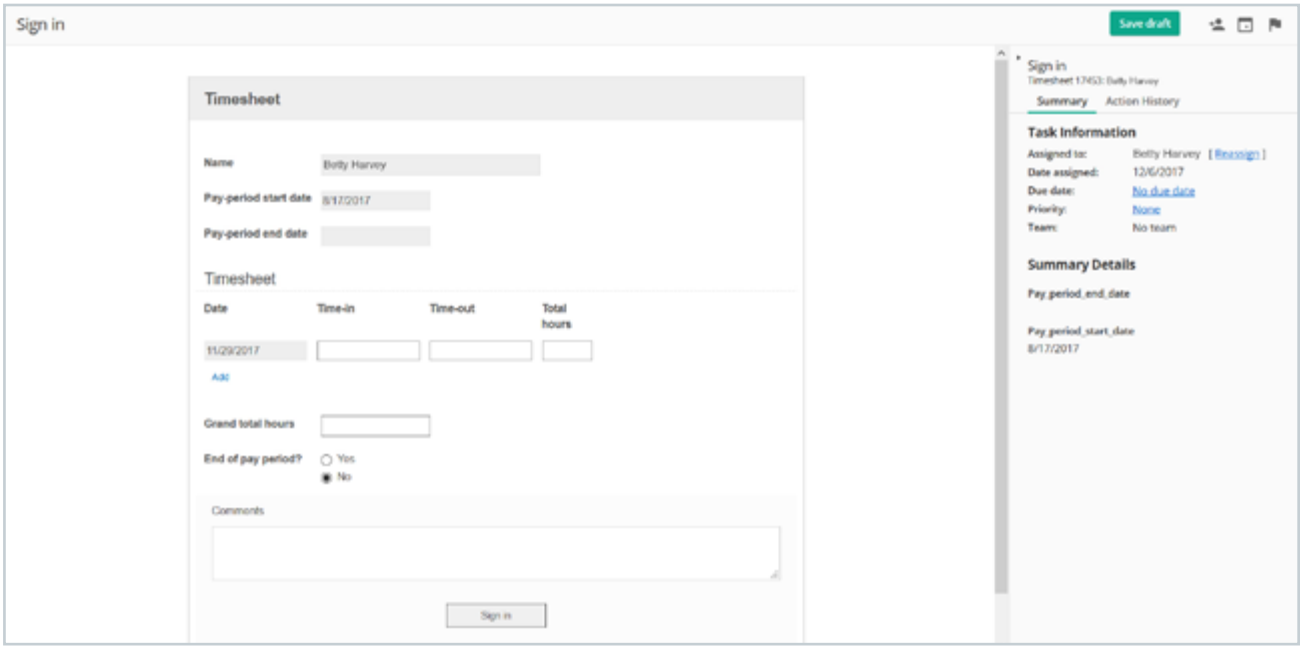
Video: Organizing and Searching Forms Tasks

Performing a Task

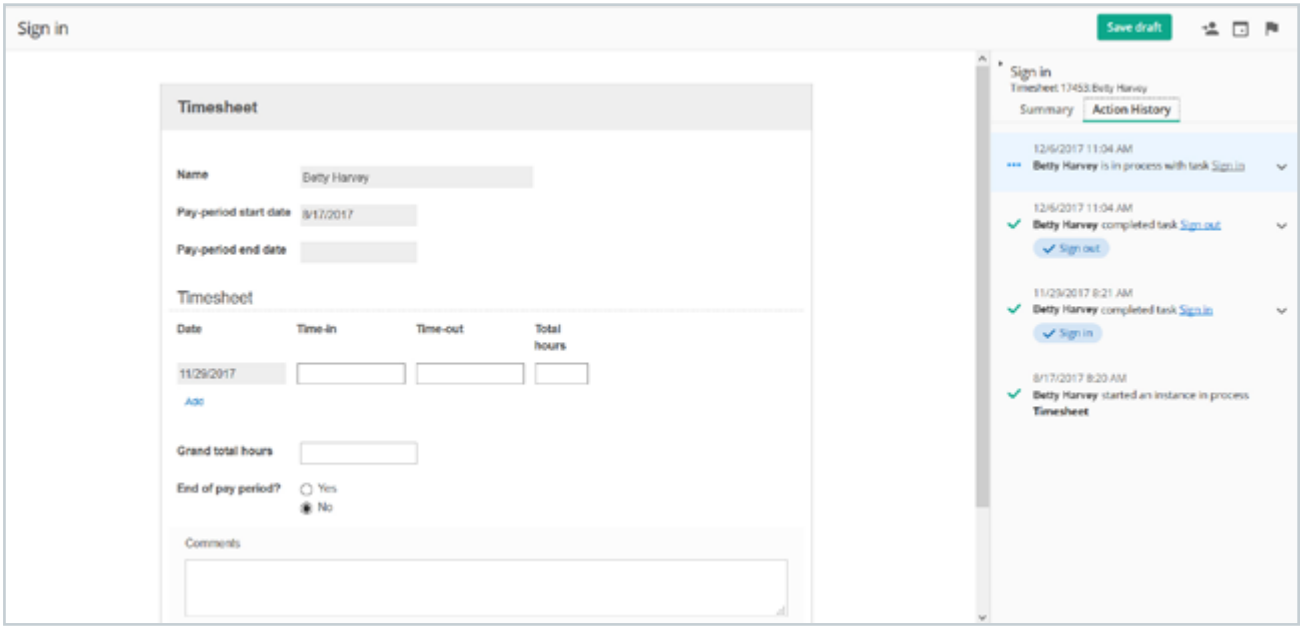
To begin a task, click the blue hyperlinked name of the task. This will open a Laserfiche form. On the right side of the task you will see the Display bar. If it is closed, click the arrow next to the word Display.

The bar has two tabs:

- **Summary:** Contains task information and includes who the task is assigned to, the date assigned, the due date, the priority and the team. Use this tab to find general information about a task
- **Action History:** Contains all of the actions the task has already been through including previous submissions, approvals, etc. Use this tab to see where the task is within the process



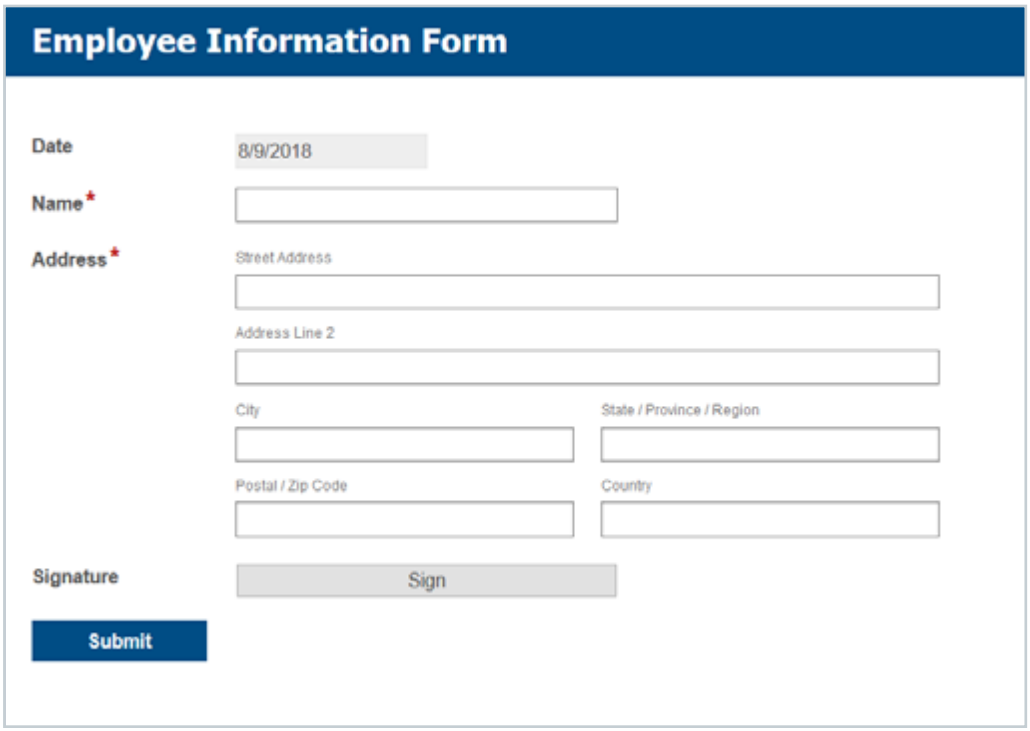
View of the open task with the Summary tab open



View of the open task with the Action History tab open

The form is composed of a series of fields, to either be filled in or reviewed. Required fields will be marked with an asterisk (*) and you will not be able to submit the form until all required fields have been filled in.

If a field needs to be filled in in a specific manner, you will receive an error message after filling in the field, detailing how you should complete the field. Some fields will contain tooltips when you mouse over them. Occasionally, fields will be read-only. These fields will be grayed out and you will not be able to change the information.

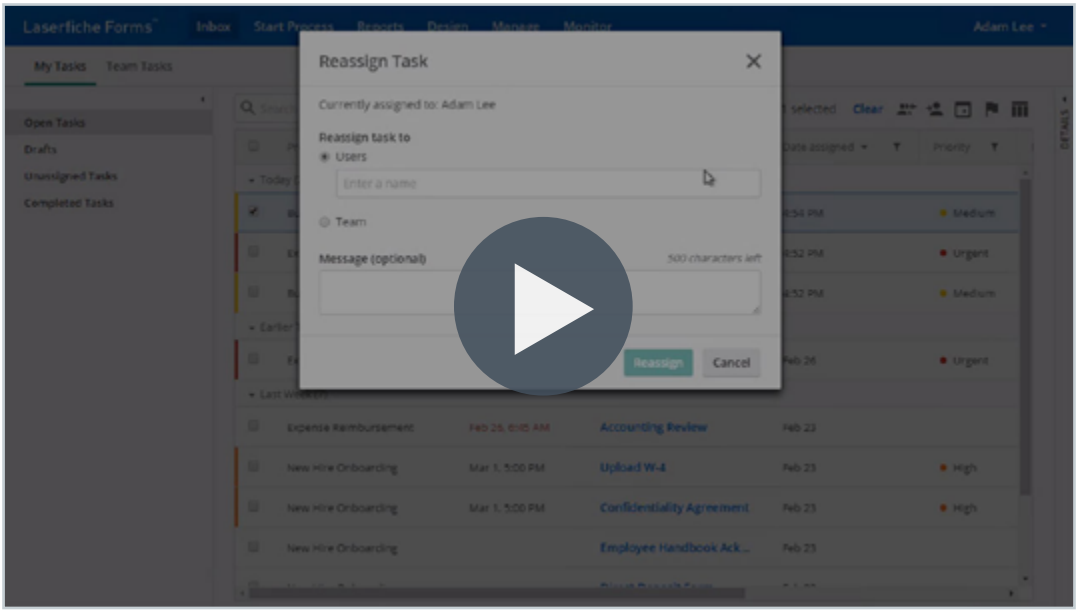


An example of a form with a read-only field and required fields

At the bottom of the form will be at least one button. The button(s) can be configured to have any text on them but most often you will see words like Submit, Accept, Reject, Approve or Deny. Clicking on any of the buttons at the bottom of the form will submit the form, completing the task. Once a task has been completed, you cannot make any changes to that form.

Some options are only available if an administrator has configured them for a particular form. They are:

- **Save Draft:** If you would like return to finish your task at a later time, click the Save Draft button on the form to save your work. This will store the document in the Drafts folder of your Inbox and you will be able to finish your partially completed form at any time
- **Reassign:** If you need to release or reassign the task to another user, click the Reassign button in the upper right hand corner of the task. You can also perform this function from the Inbox by selecting the task and clicking the Reassign option. You can also release the task to be claimed by anyone



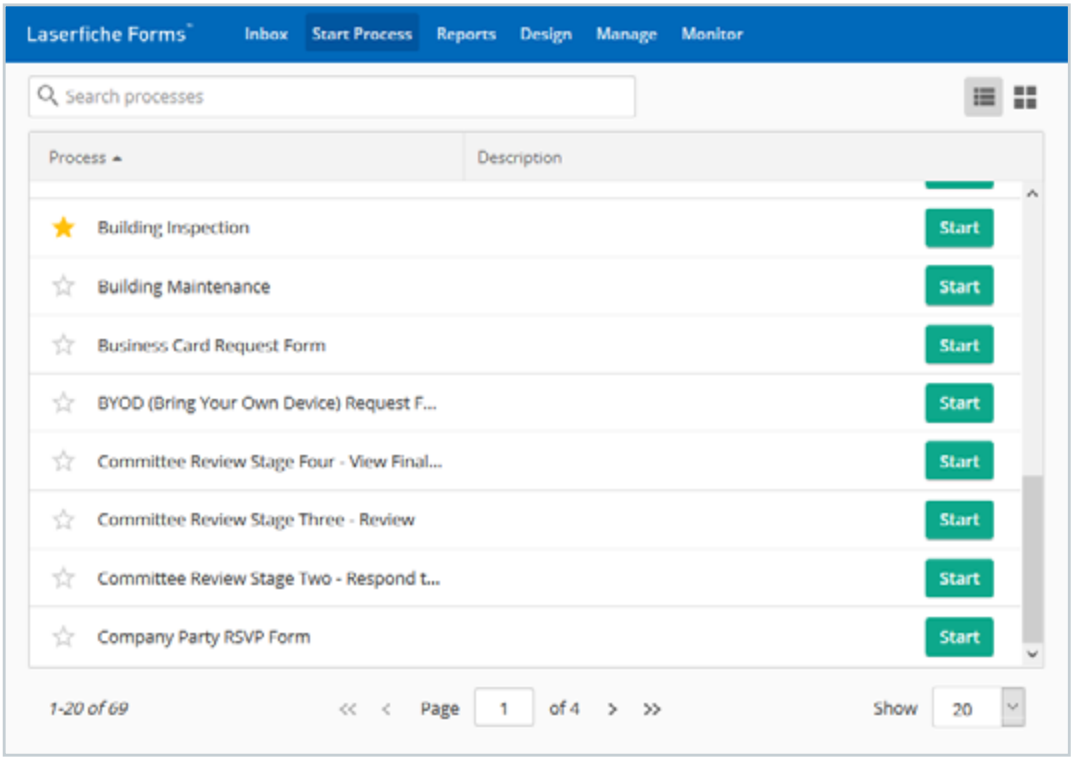
Video: Reassigning Forms Tasks

Starting a New Process

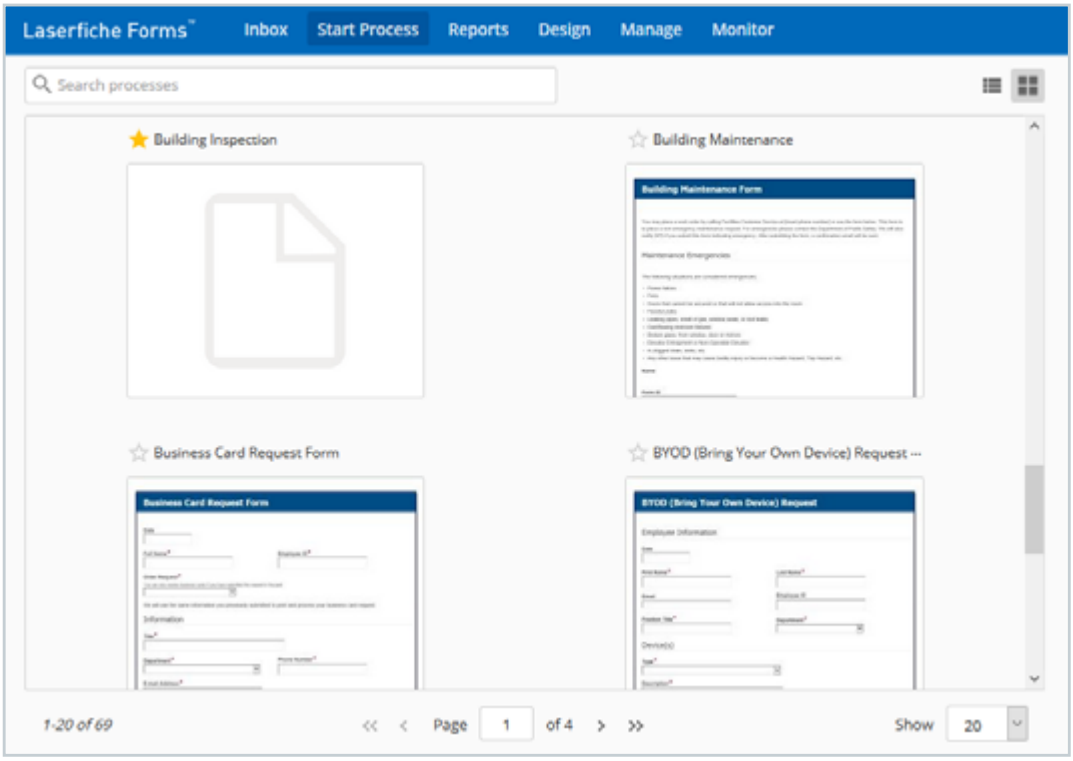
If you have not been assigned a task, you can still initiate a process using the Start Process tab. By default, all processes that you are able to initiate are listed alphabetically. Use the search bar to enter keywords to search for specific processes.

The processes can be viewed as either a list or a grid. The processes are in list mode by default and you can toggle between the two by selecting their respective icons in the upper right corner. To start a task in list mode, click the green Start button next to the name of the process. To start a task in grid mode, click the tile of the process you would like to begin.

If you use a process frequently or need it to be easily accessible, pin a process to the beginning of the list by clicking the star to the left of the name of the process.



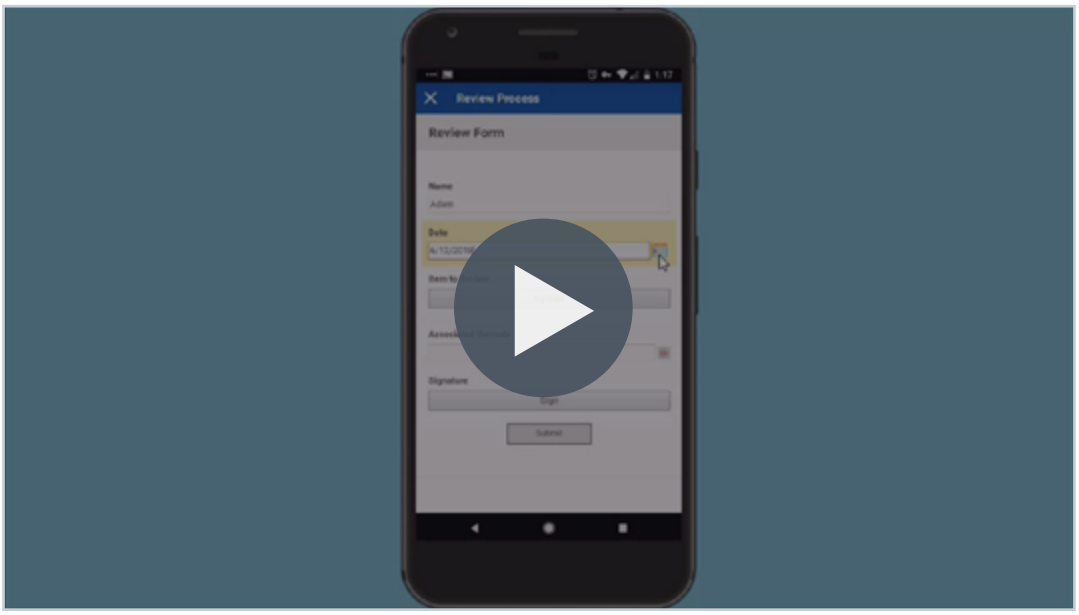
The Start Process tab – list view



The Start Process tab – grid view

Using Forms in the Laserfiche App

You can also access Forms through the Laserfiche app. Here you can perform many of the same functions as on a computer and you can add photos directly from your phone to your form submission. For more information on the Laserfiche app, view the Laserfiche app help files.

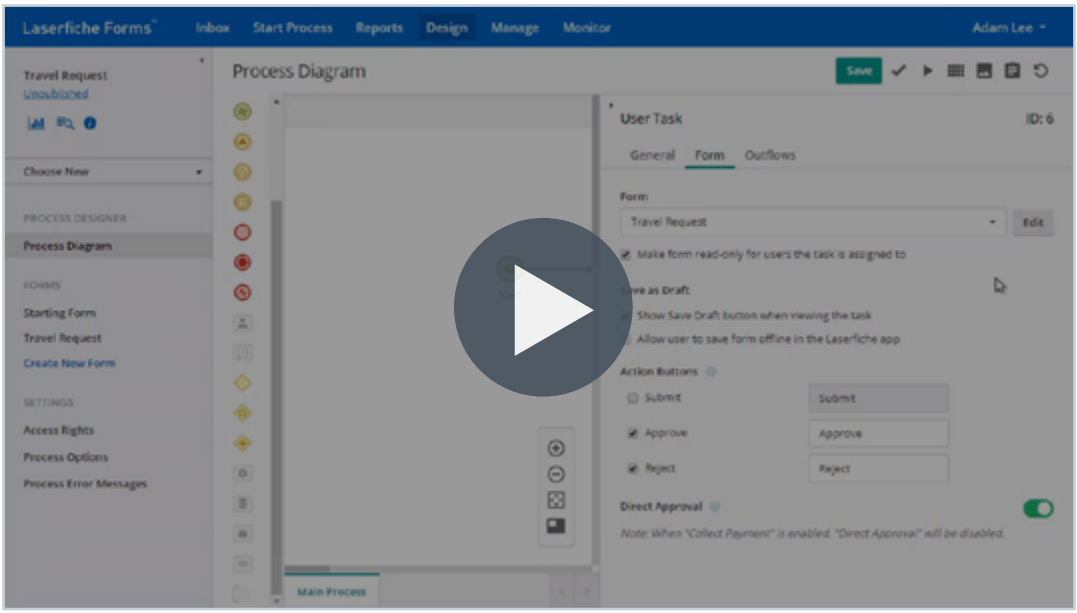


Video: Filling Out a Form in the Laserfiche App

Chapter 3

Building a Form

This section will help you to begin designing your first Laserfiche form. In addition to creating electronic forms, Laserfiche Forms also allows you to automate your business processes.



Video: How Forms and Processes are Related

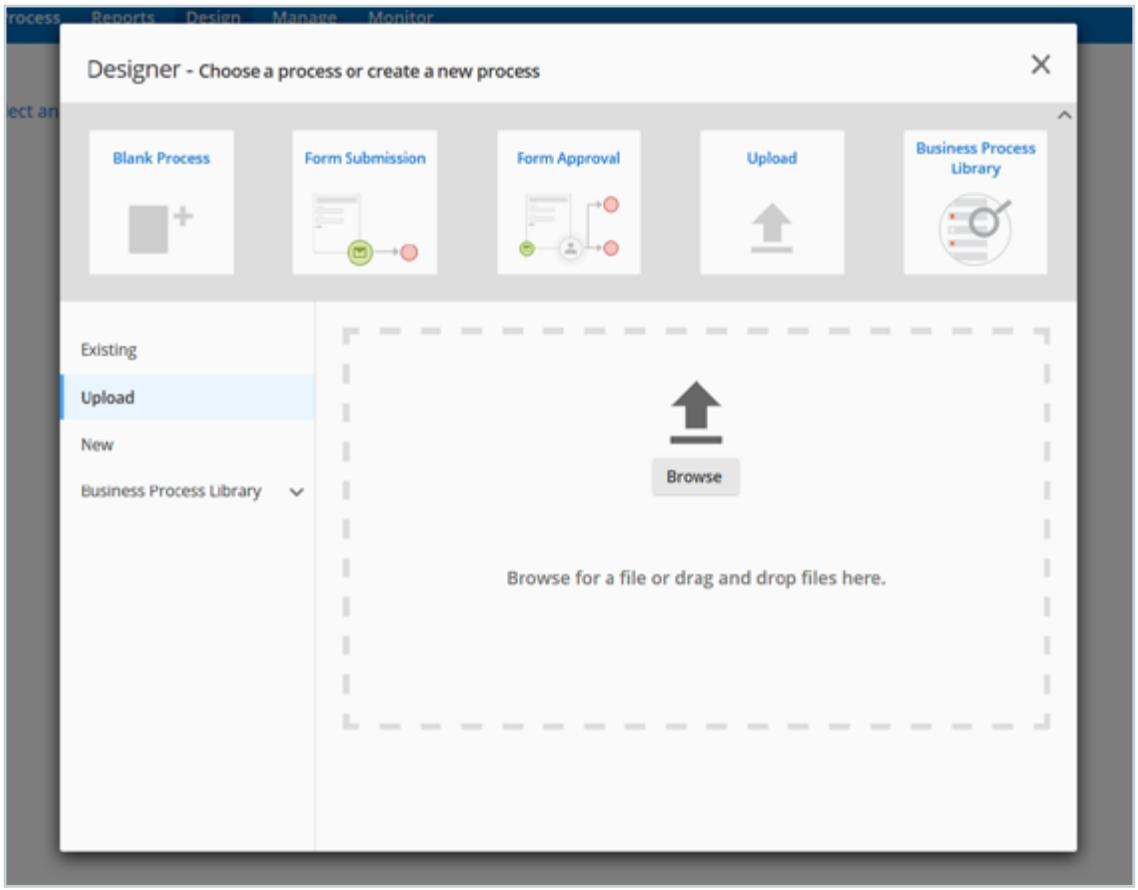
Before designing your process, be sure to map out your business process in full. If you need assistance with this step, read this white paper or this Solution Exchange article.

Throughout this section of the guide, there will be links to the Laserfiche help files for more information.

To begin creating a Laserfiche form, select the Design page. This action will open the Designer pane.

Note: The Design page will only be visible to you if you are an administrator or if you have the Process Creator role assigned to you. If you would like to create forms but don't currently have the ability to, please contact your Laserfiche administrator.

The Designer pane allows you to create a new Forms process, work on an existing Forms process or upload a Forms business process XML file from your computer. This is also where the Business Process Library is located.



The Designer pane

Along the top of the Designer pane are five quick start buttons.

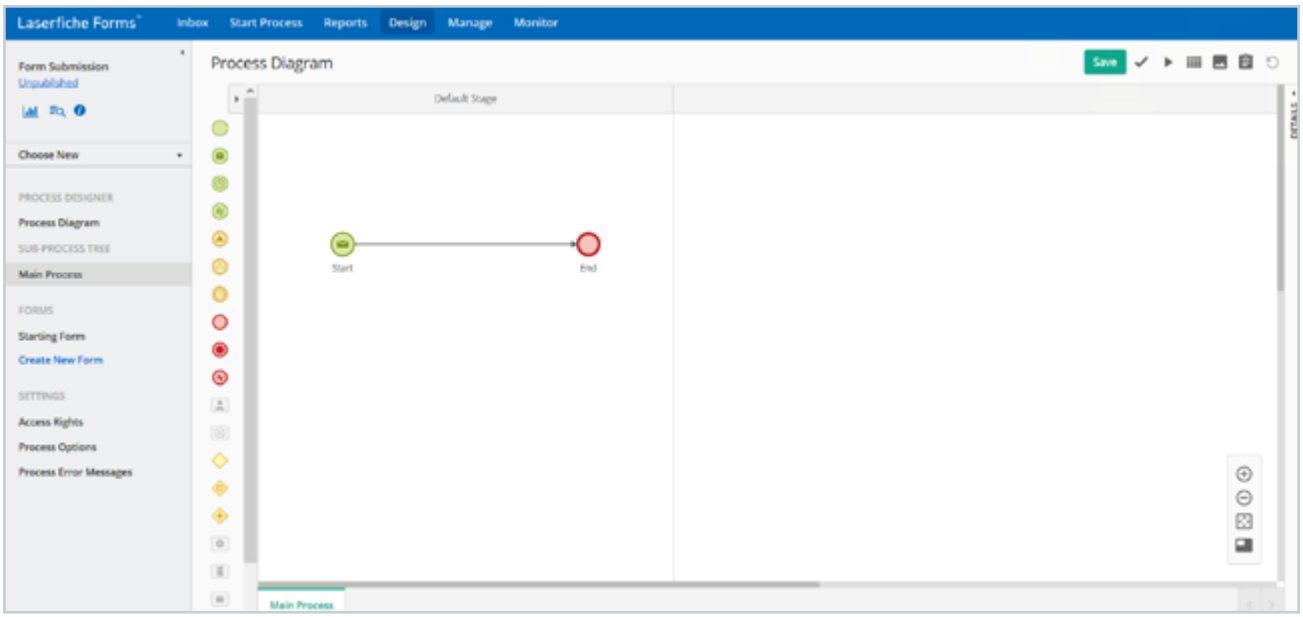
- **Blank Process:** Select this option to begin a process from scratch
- **Form Submission:** This button takes you to simple process with a starting form and end event
- **Form Approval:** This button takes you to a simple process with a starting form, an approval step and an end event
- **Upload:** Use this option to upload an existing process from your computer
- **Business Process Library:** This option takes you to the Business Process Library where you can choose a template to begin with

You also have the option of editing an existing processes that you or your team members have created.

To begin creating a form, click the Blank Process, Form Submit or Form Approval button. This will prompt you to name your process and take you to the Forms Process Diagram page.

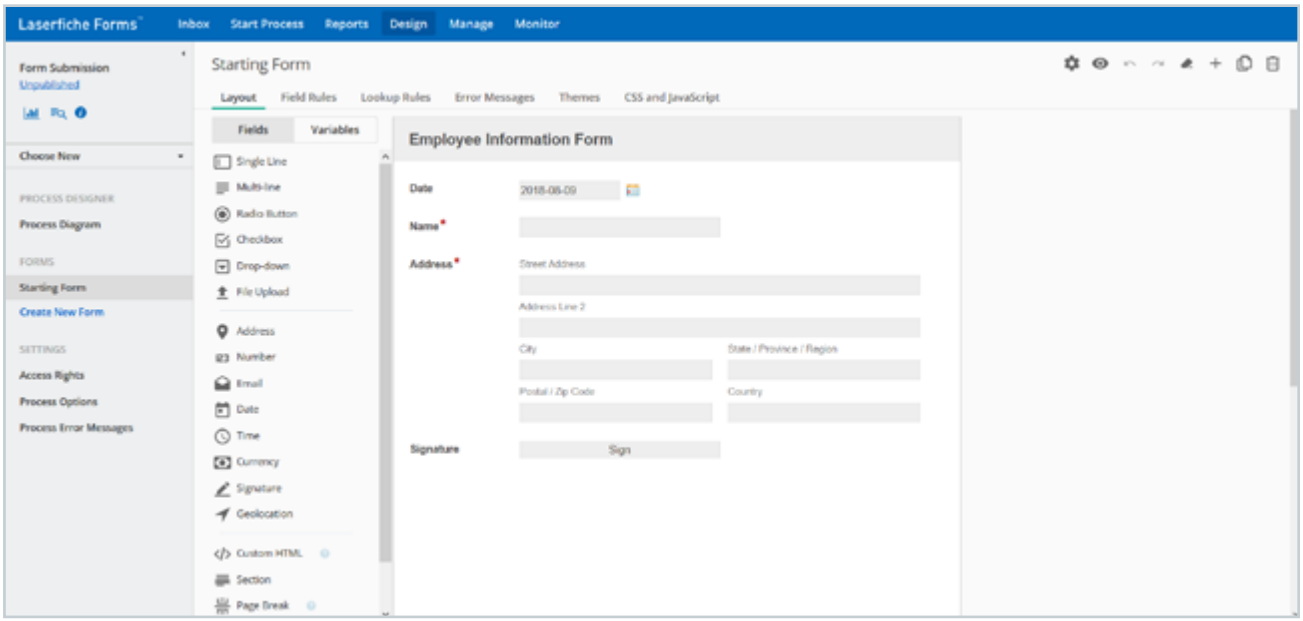
Building a New Form

The basis of most processes is your starting form. This is the form that a user will complete to kick off your process. Information from that form can be approved, stored or used later in the process. To edit this form, click the **Starting Form** button on the left side of the Process Diagram or click **Create New Form**. The information from this section of the guide can be used to create any form, not just starting forms.



The Forms Process Diagram with the Starting Form option selected

When creating a form, you will be directed to the Layout Page. Think about what information you need to gather from your users and add the fields that will help gather that information.



The Layout Page in the Form Designer

To begin, give your form an intuitive name by selecting the Starting Form title and changing the text. To create your form, drag fields from the toolbox on the left side of the screen onto the central canvas. These fields can be reordered or deleted at any time. Any time you drag a field onto the canvas, you create a variable. Variables are containers for process and field information. A variable lets you use the values entered in the field in another form or as part of your process.

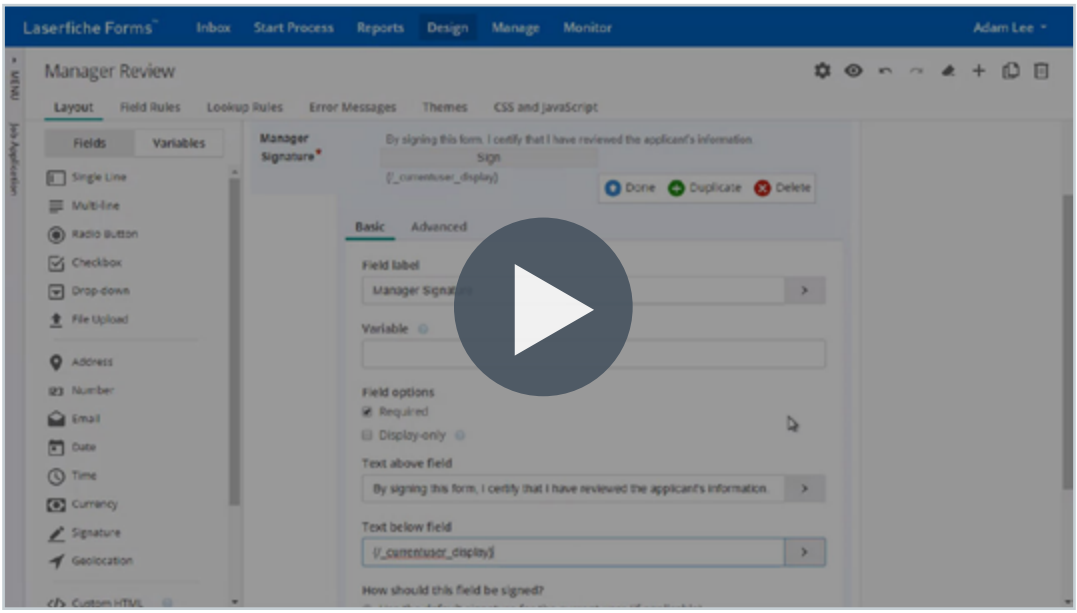
Frequently used field types include:

- **Single line/multiple line:** Allow users to write in any type of text
- **Address/email:** Request an address in a standard format
- **Number:** Allow users to write in numbers that can be used in calculations
- **Email:** Request an email address in a standard format
- **Checkbox/drop-down/radio button**: Provide a predetermined list of options for users to select from
- **Signature:** Allow users to apply a signature to a form
- **File Upload:** Allow users to upload files to include with the form submission

In order to create a more visually organized form, you can alter the form's layout by using:

- **Tables:** This allows you to present fields in tables with different field types as columns. These can either have a set number of rows or you can allow users to add rows as needed
- **Collections:** These are grouped fields that can be repeated as a set. For example, if you want to know about a user's children, you can ask them for the child's name, age, and gender. Then, if they have another child, they can click the Add button and get asked the same questions for a new child
- **Sections:** This creates visually distinct, collapsible segments of a form. Each field placed under a section is part of that section
- **Pages:** This breaks the form into different pages or tabs. This is particularly useful for longer forms, allowing you to keep relevant information grouped together while not overwhelming users with an excessively long list of questions

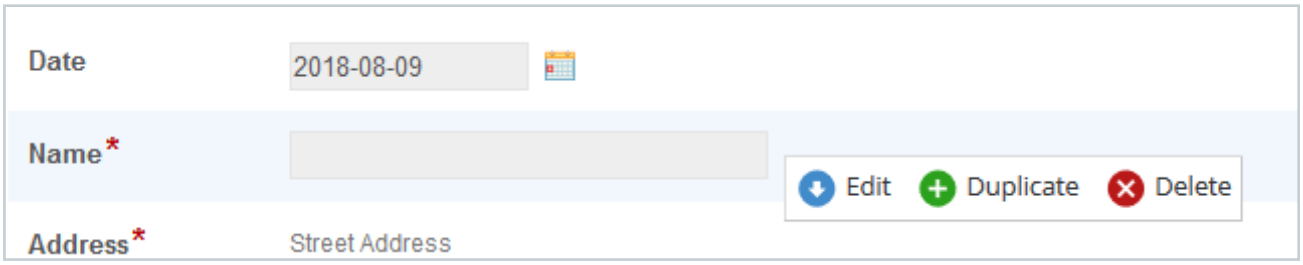
For a complete list of fields and more information on how to configure them, view the Laserfiche Forms help files.



Video: Adding a Signature Field to a Form

Customizing Fields

To configure a field, select it and click **Edit**.

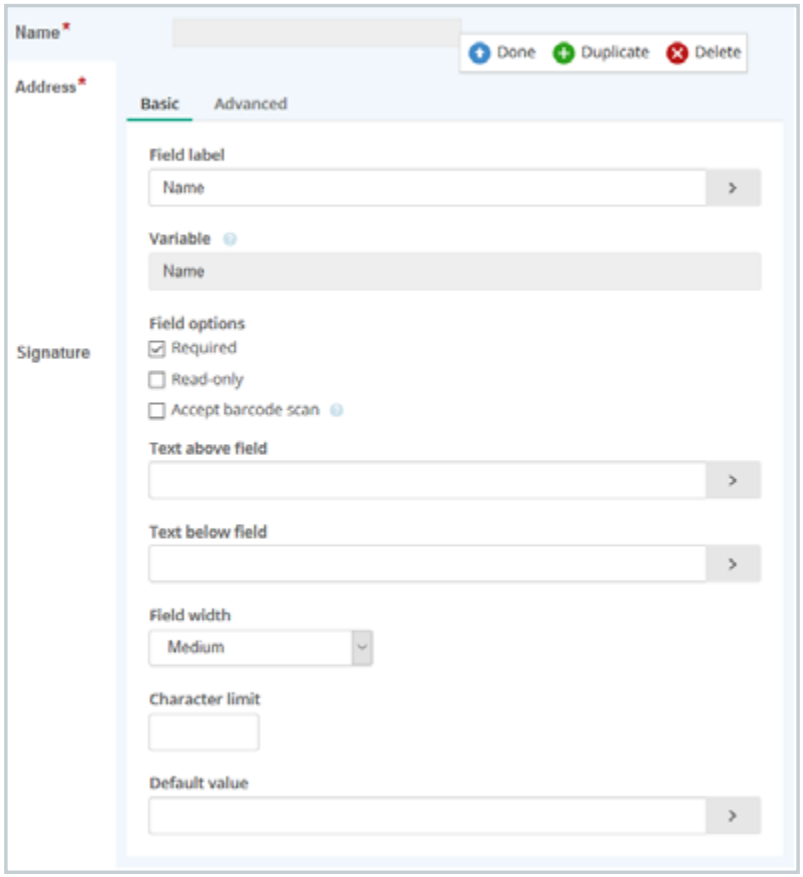


When you select a field, you are presented with the option to edit it, duplicate it, or delete it

When configuring individual fields, you have the option of making them required by selecting the **Required** option under **Field Options**. This will ensure that a user will not be able to submit the form until the required field is filled in. Required fields are marked with a red asterisk (*).

If you want to prevent users from changing the value of a field (for example, date fields) choose the read-only option.

For more information about advanced customization of each of the fields, view the Laserfiche Forms help files.

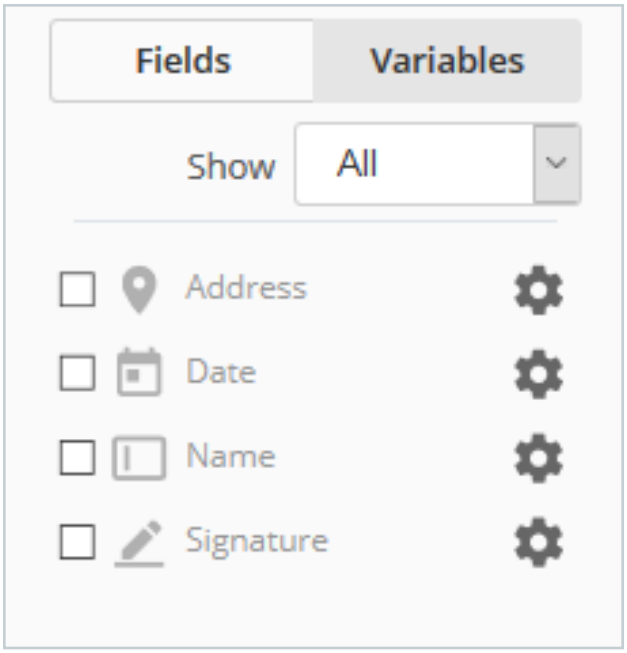


Customizing the Name field

Close the field configuration by clicking the **Done** option. You can also choose to create a copy of the field by selecting the **Duplicate** button or delete the field by selecting the **Delete** button.

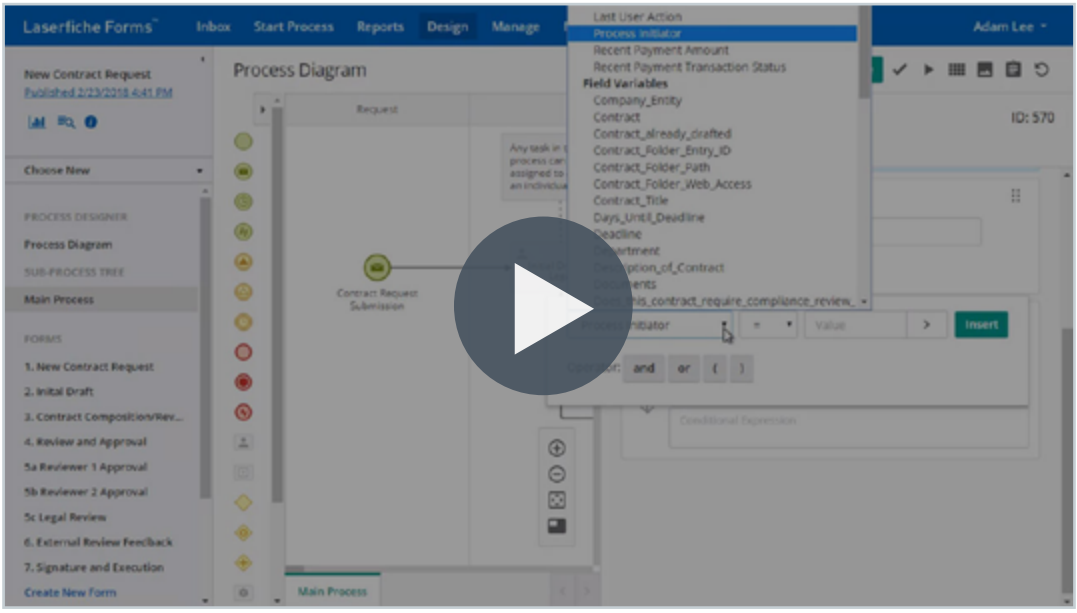
Variables Tab

When you create a field, the variable for that field is also created. Click the **Variables** tab to view the variables you have already created. Edit variables by clicking the settings button to the right of the variable. The variables from one form can be used as fields on another form within the same business process. Simply drag them to the canvas like you would a regular field.



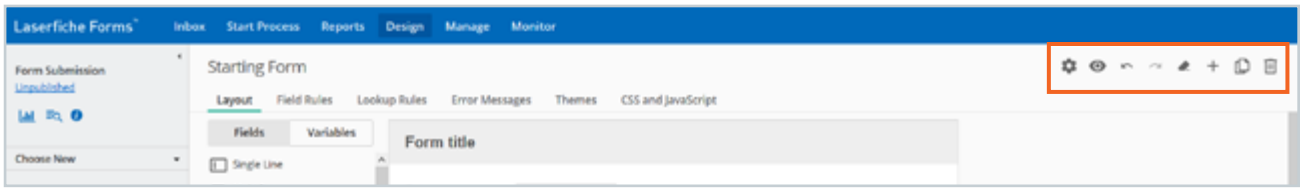
The Variables tab

For more information about variables, view the Laserfiche Forms help files.

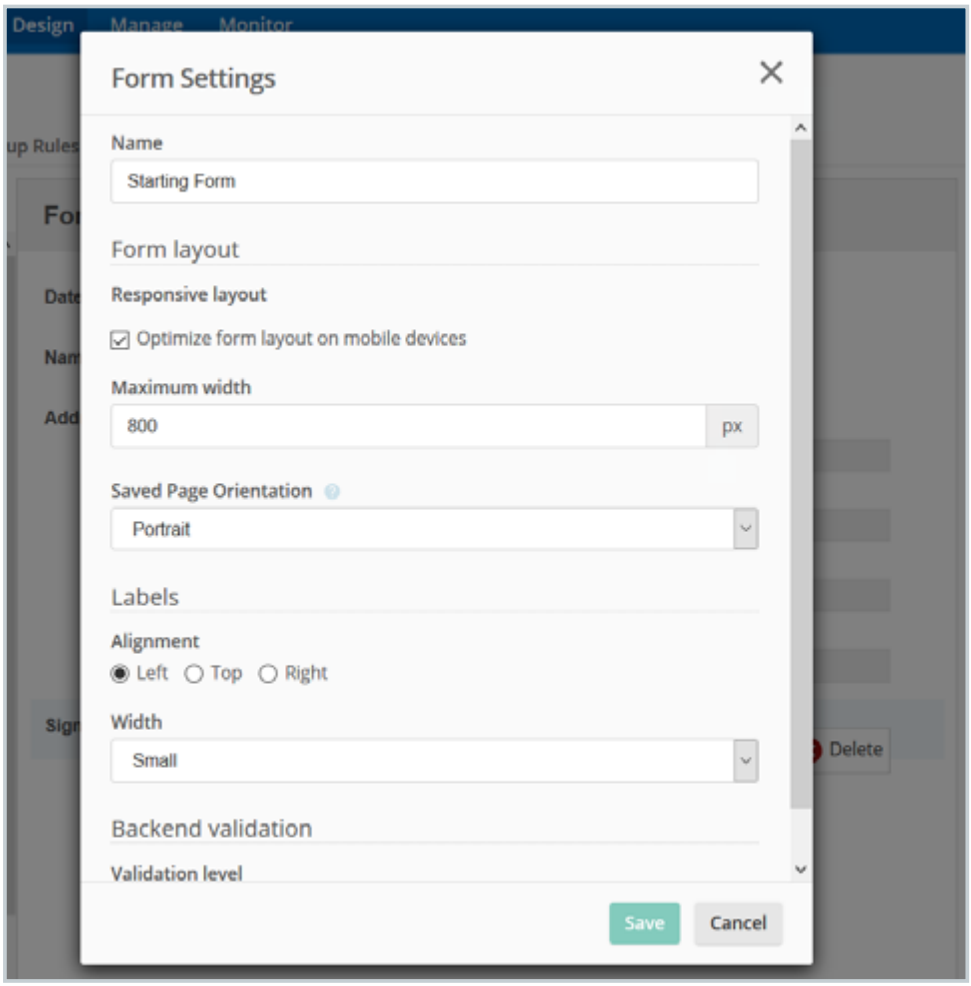


Video: Using Variables in a Forms Process

More Options



The More Options menu in the Forms Designer



The Form Settings configuration pane

- **Form settings:** Change the name, responsiveness of the form, maximum width, page orientation and more here

- **Preview:** See what the current form will look like in production
- **Undo:** Undo your last action
- **Redo:** Redo the action you have most recently undone
- **Clear Form:** Delete all the fields from the form and leave it blank
- **New Form:** Create a new form
- **Copy:** Create a copy of the current form with all of the fields and corresponding variables
- **Delete:** Delete the entire form

Advanced Configuration

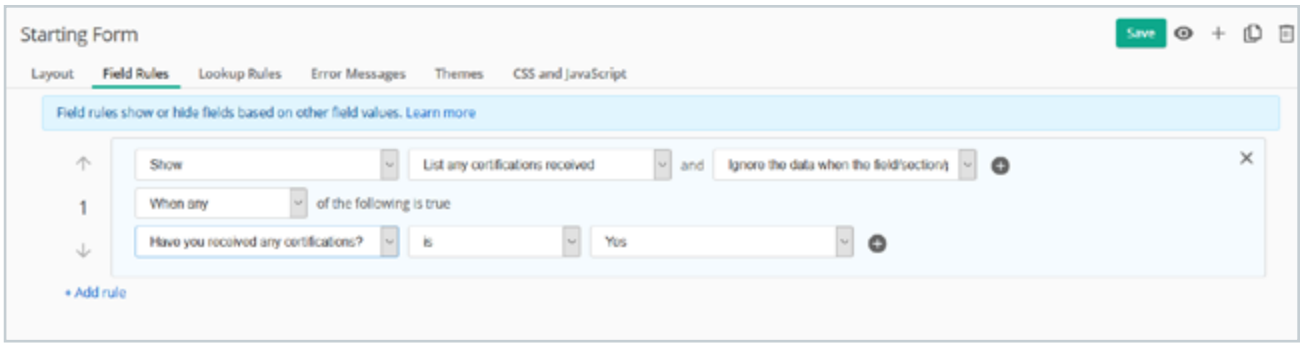
The Forms Designer allows you to further customize your form by adding field rules, looking up information from an externa database with lookup rules, creating custom error messages, changing the look and feel of the form with themes, and adding specific CSS and JavaScript formatting.

Field Rules

Field rules allow you to show or hide certain fields based on options a user has selected.

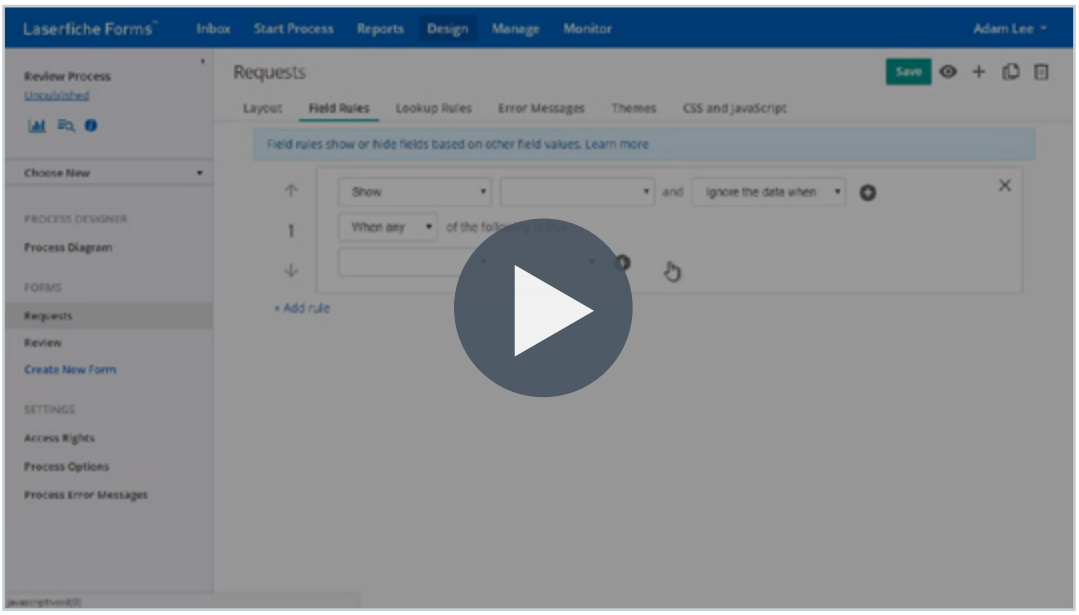
Field rules are configured using a series of drop down options. First, decide if you want to either show or hide fields. Then, choose if you want these fields shown/hidden when any, all, or none of the next section is true. Lastly, choose what user behavior will cause the fields to be shown/hidden by selecting a field and an action. Make sure to save your field rules after you create them by clicking the **Save** button.

For example, you can ask users to fill in a "Certification Name" field only when they have selected "Yes" to the question "Have you received any certifications?"



Creating a field rule

Learn more about how to configure field rules in the Laserfiche Forms help files.



Video: Showing and Hiding Form Fields

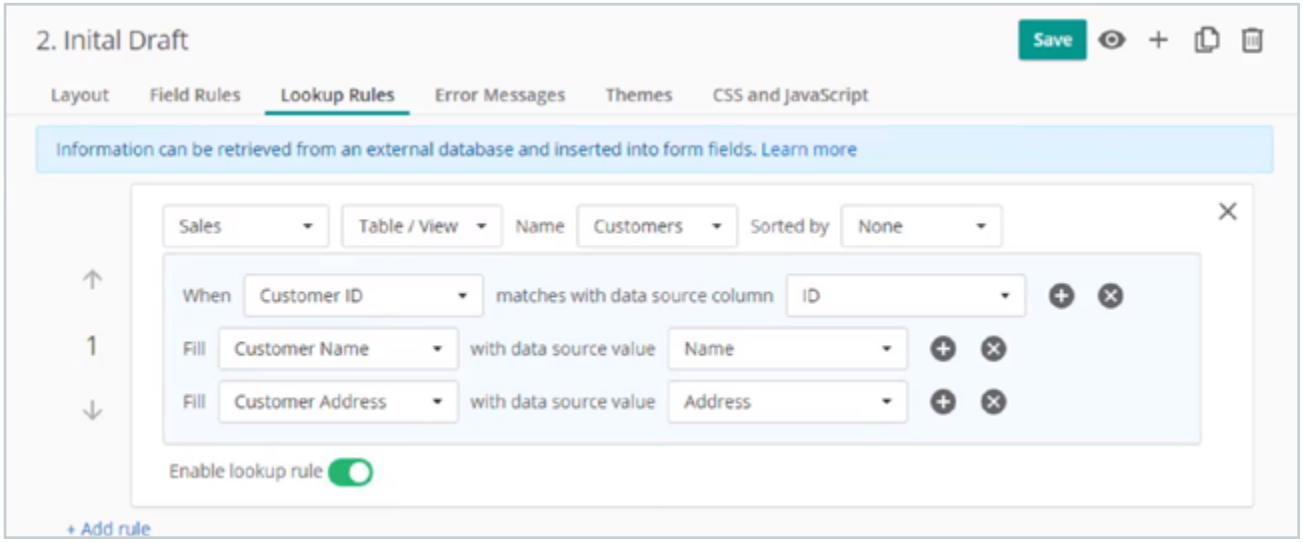
Lookup Rules

Note: Only users with Forms Professional will see this tab.

Lookup rules allow you to prepopulate forms with information from an external database. First, an administrator must add a database as a data source for that business process on the Data Sources page. To learn more about adding external data sources, read the Laserfiche Forms help files.

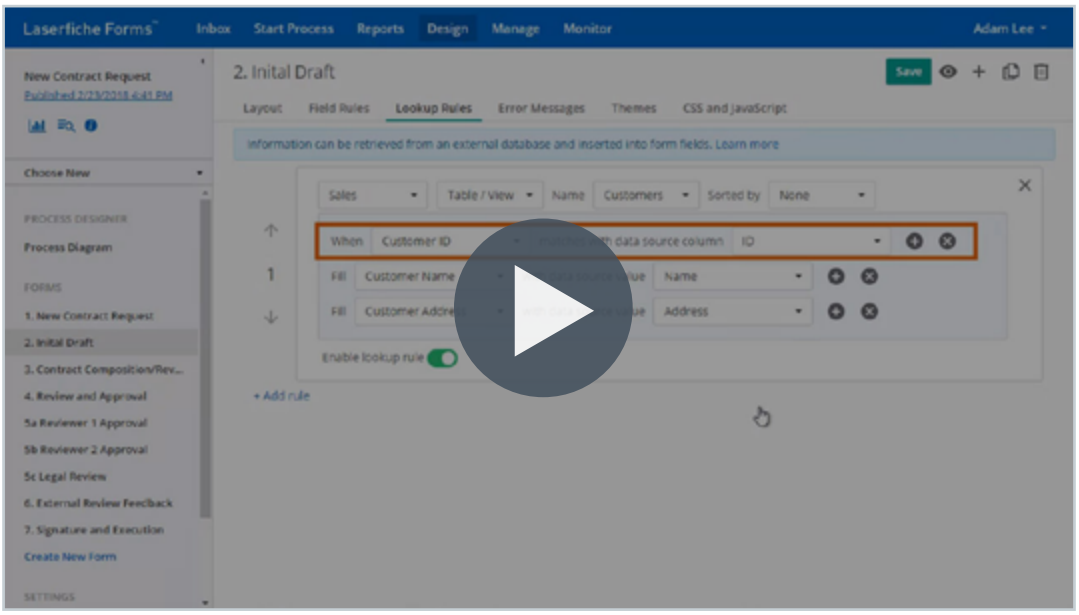
Next, select which database you would like to use as a source and configure which fields will be filled in using the drop downs.

Lookup rules are useful for reducing data entry. If an employee enters his ID number, his name, address and other information can then be automatically populated.



Configuring the Lookup Rules

For more information on configuration, view the Laserfiche Forms help files.



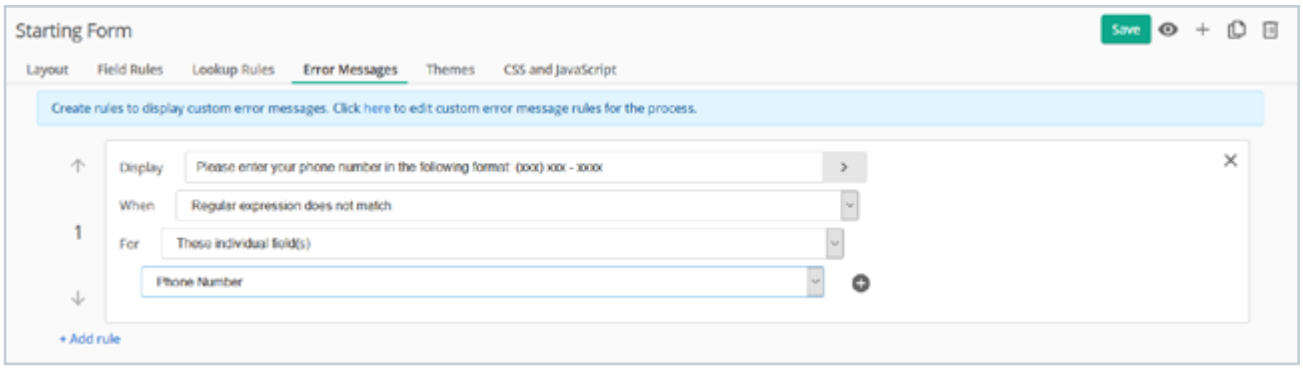
Video: Using a Database Lookup Rule to Fill Out a Form

Error Messages

Error Messages allow you to show a message to users if they fill out a field incorrectly.

First, type in the error message that you would like to display. Then choose the error type and the error scope using the drop down options.

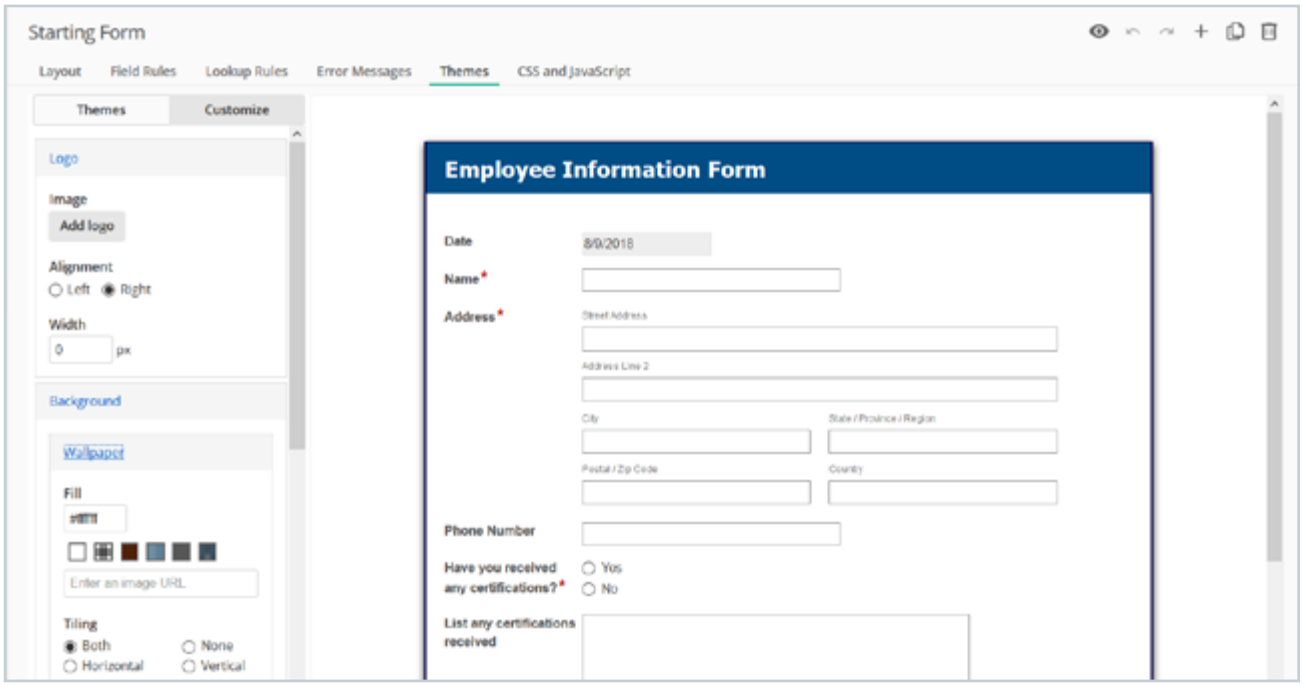
For example, if you'd like phone numbers to be entered in a specific way, you can have an error message appear if a user tries to enter a phone number formatted differently.



Creating a new error message

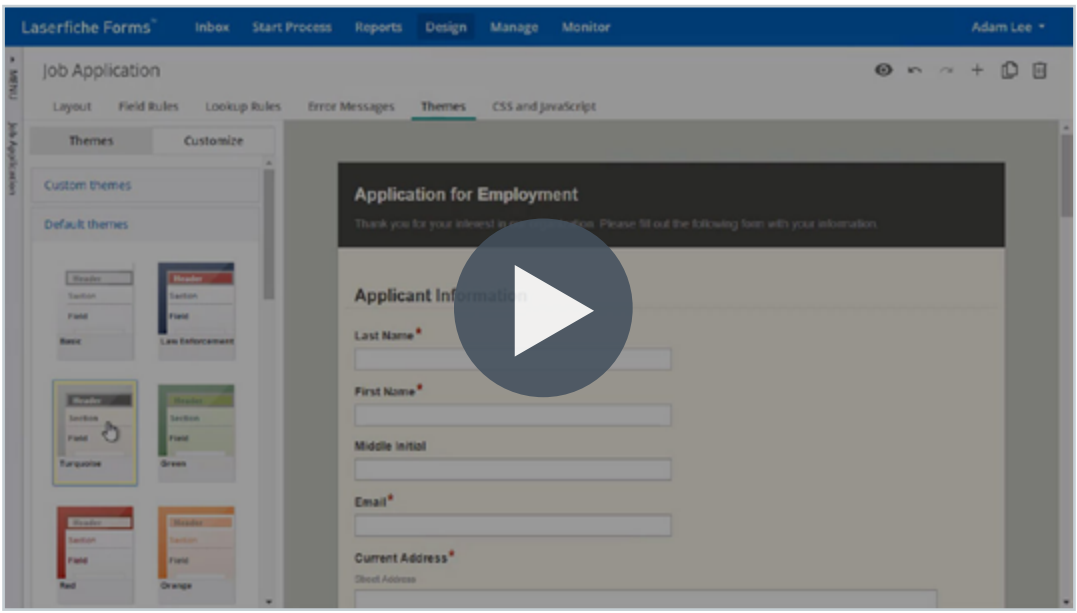
Themes

The Themes tab allows you to easily change the look of your form. Here you can browse through a selection of default themes or create a custom theme. You can add a logo and configure elements like backgrounds, fonts, borders and spacing.



Customizing a form's theme

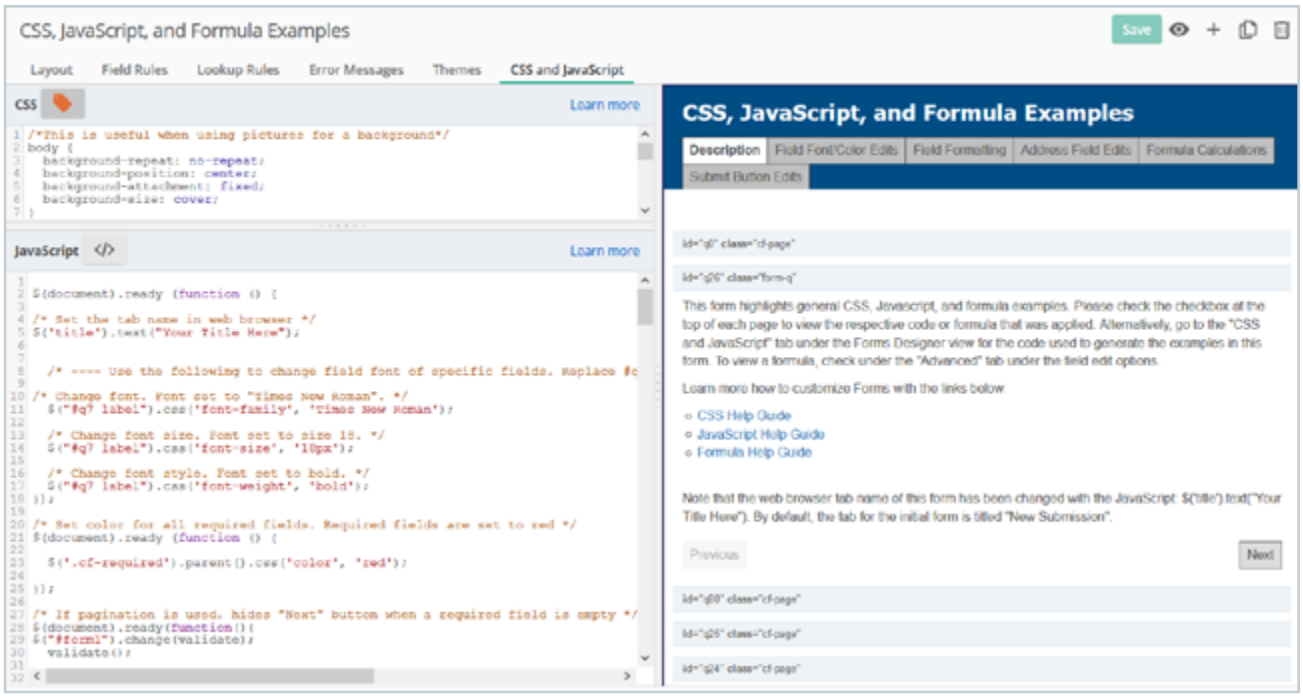
For more information, see the Laserfiche Forms help files.



Video: Configuring a Form's Style

CSS and JavaScript

The CSS and JavaScript page allows you to customize the look and performance of your forms even further. This section requires programming knowledge. Here, you can add code to alter your form in different ways including filling certain fields with values that depend on the user's actions, or changing the form's appearance if certain user actions happen.



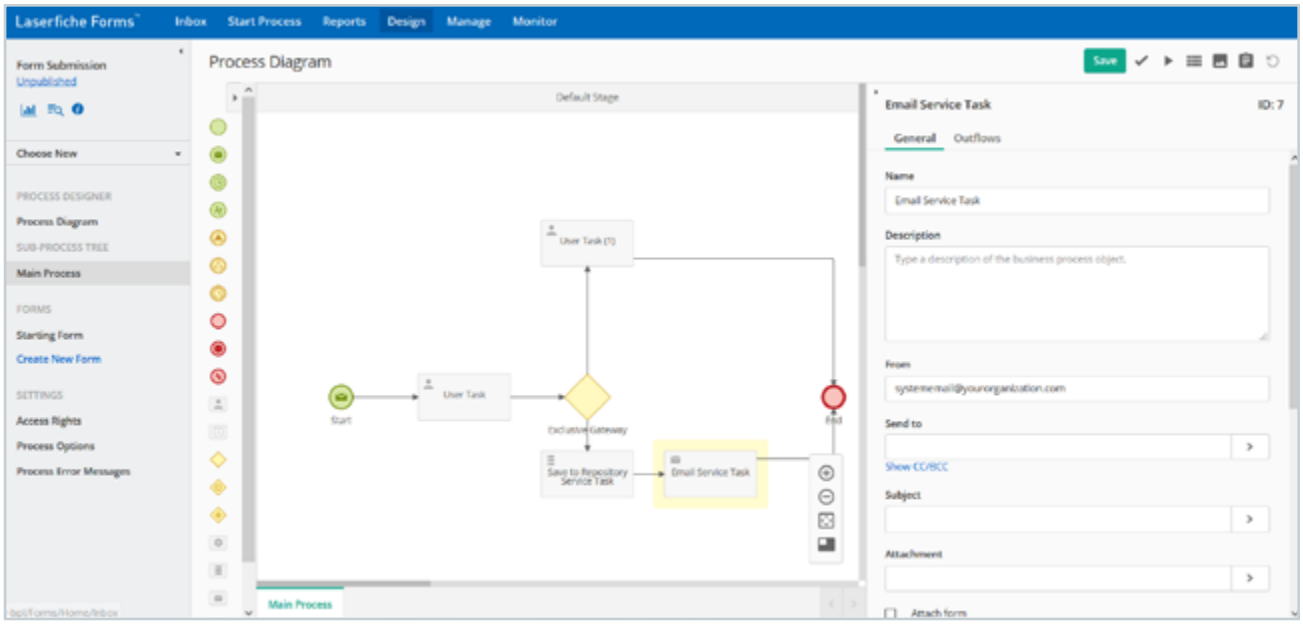
Adding custom CSS and JavaScript to a form

Information about more advanced customization, can be found in the Laserfiche help files. For even more CSS customization, see the Using CSS in Laserfiche Forms white paper. In addition, there is a lot of information on custom JavaScript, including examples, on Laserfiche Answers.

Chapter 4

Designing a New Process

The Process Diagram page is where you will add the events and activities (known collectively as objects) that make up your process.

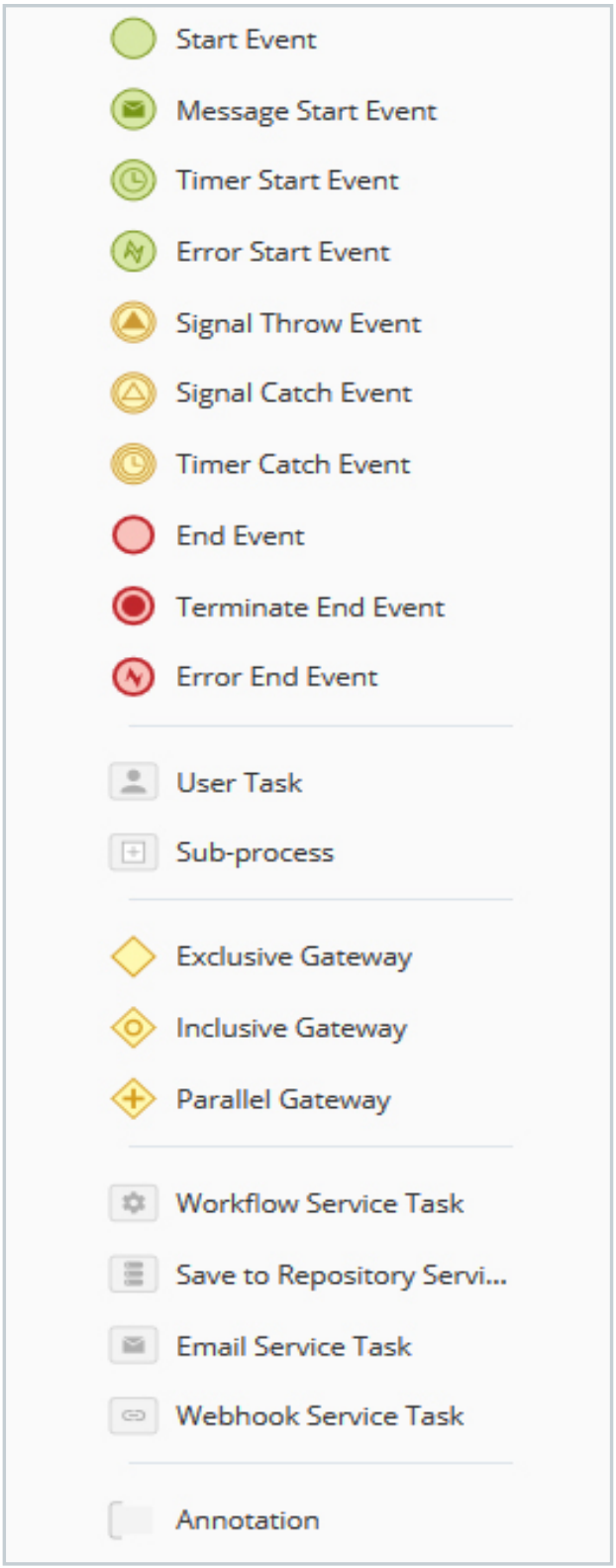


The Process Diagram page

Every process begins with a **Start Event** and ends with an **End Event** and includes numerous objects in between.

For more information about Start Events and End Events, see the Laserfiche Forms help files.

Different objects can be dragged and dropped onto the canvas to recreate your process.

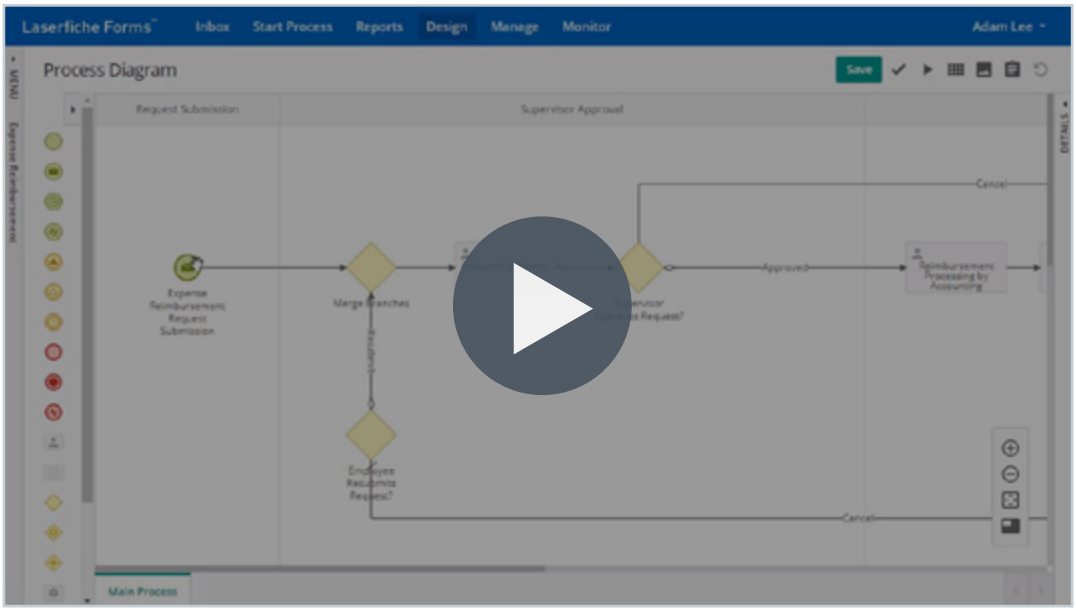


The list of objects that can be used to create a process

Tasks can either be user tasks (performed by a Laserfiche user) or service tasks (performed by an application such as Laserfiche Workflow). They include:

- **User tasks:** Represent actions by participants in a business process (must be Laserfiche users)
- **Email tasks:** Automatically send an email to one or more users (do not have to be Laserfiche users) at a specified point in the business process
- **Save to the repository tasks:** Save a copy of a particular form and its attachments to the Laserfiche repository
- **Workflow tasks:** Start a Laserfiche workflow at a specific time in a business process

For more information on configuring and customizing user tasks view the Laserfiche Forms help files. For a full list of tasks and information on how to configure service tasks, view this page in the help files.

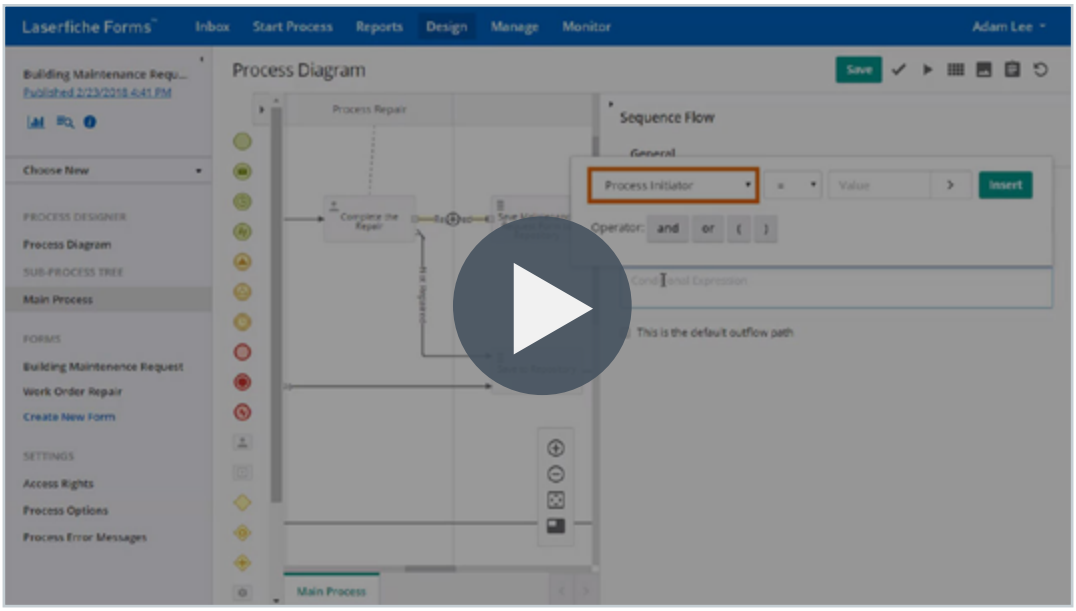


Video: Saving a Form to Your Repository

When certain actions should occur based on certain decisions, you will use gateways. There are three gateway types:

- **Exclusive:** Only one outflow task can be taken. Represents an either/or decision
- **Inclusive:** Multiple outflow tasks can be taken. Represents and/or decision
- **Parallel:** All outflow tasks will be taken

For more information on gateways and when they should be used, see the Laserfiche Forms help files.

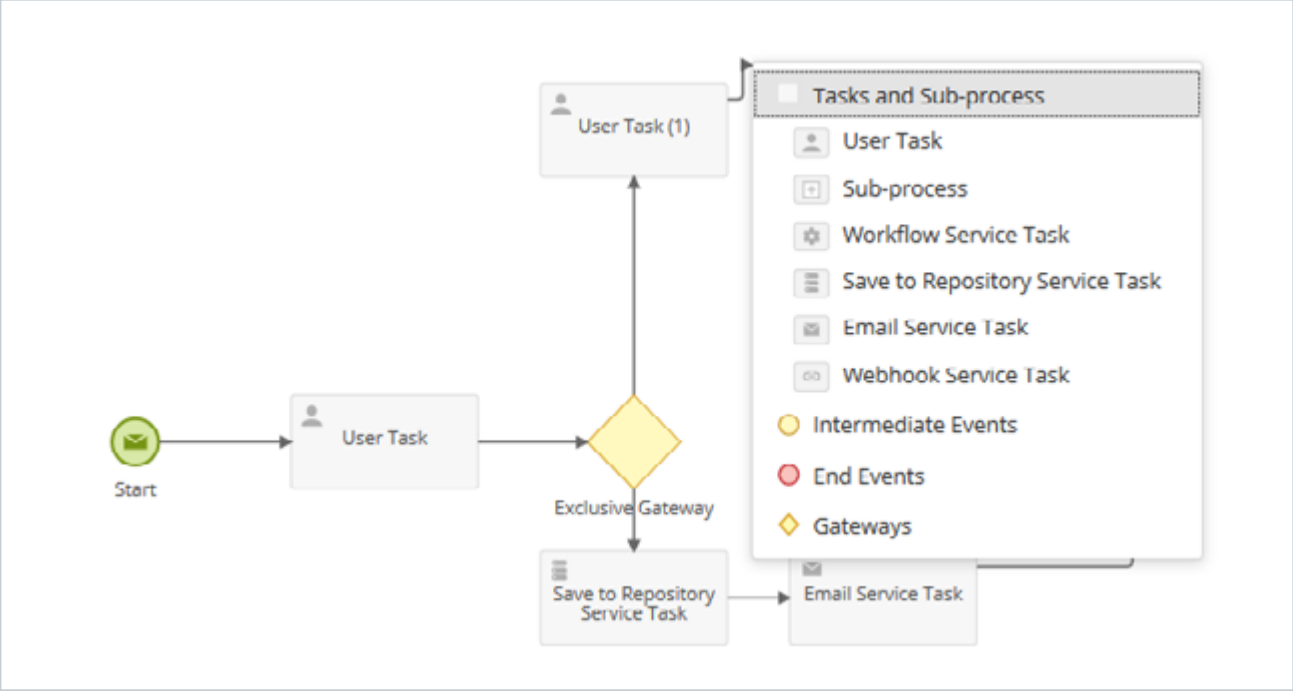


Video: Defining Routing Conditions in Laserfiche Forms

Adding Objects to the Canvas

To add an object to your canvas, drag the desired object from the toolbox on the left side of the screen onto your canvas. These objects can be moved or deleted at any time. If your canvas does not already contain a starting event, add one first. From there, determine which step is next in your process. Does the submitted form need to be reviewed and approved? Add a user task. Does the form need to be saved to the repository for future reference? Add a service task. This process flow will be determined by the business process diagram that you created before creating your form.

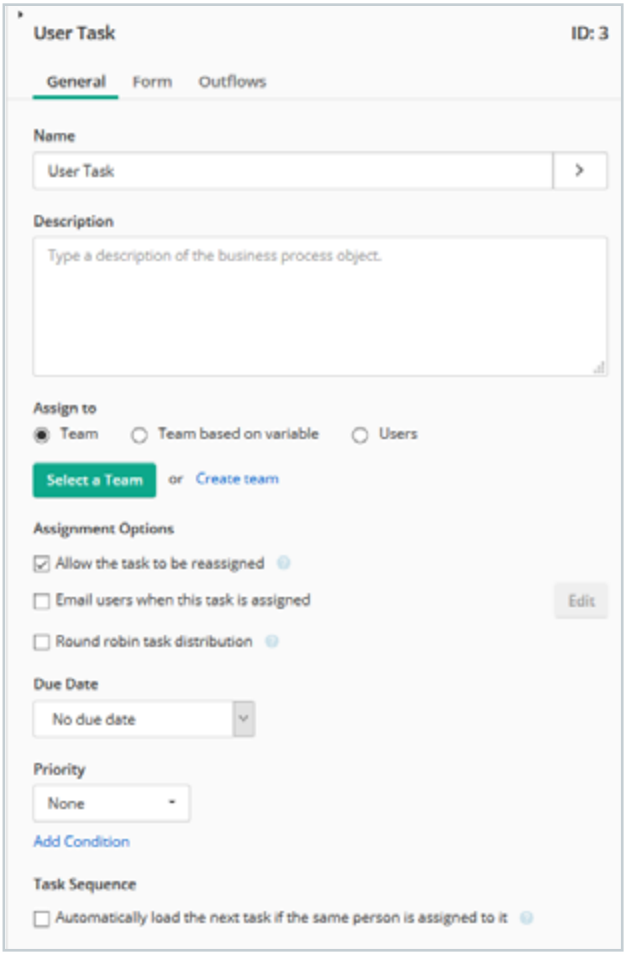
Connect these objects by clicking one of the gray dots on the perimeter of the object and dragging the outflow path to the next event in the process.



Connecting various objects together

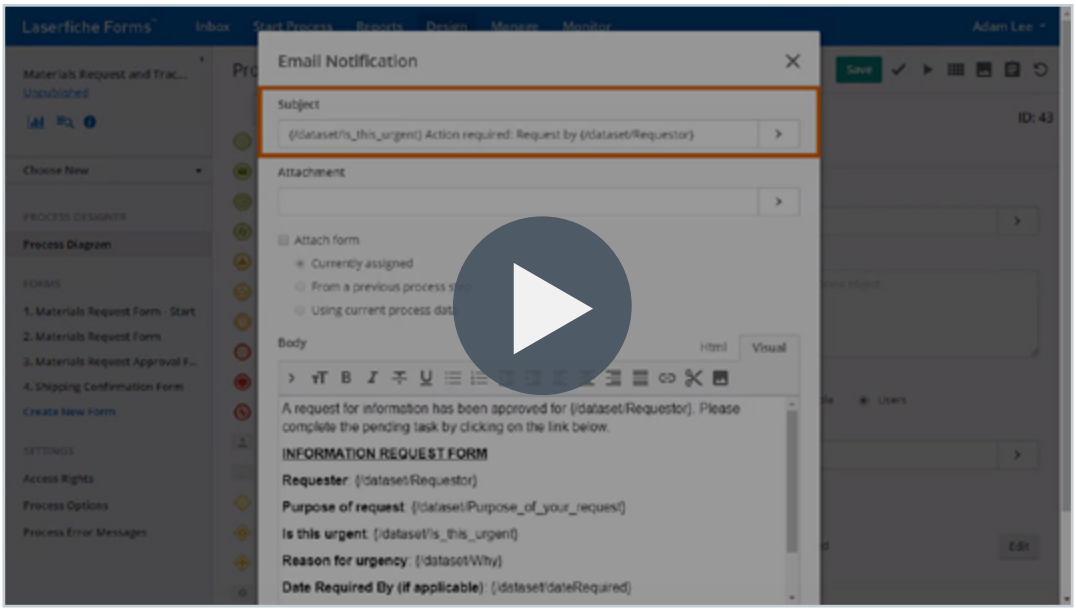
Use gateways when a business process should proceed in different ways depending on which action is taken. For more information on conditional expressions for outflow paths, see the Laserfiche Forms help files.

After arranging the objects on the canvas, double click each object to name and configure it. Be sure to name your objects descriptively and remember that you cannot use the same name for multiple objects. For information on how to configure these individual tasks, see the Laserfiche Forms help files.



Configuring a user task

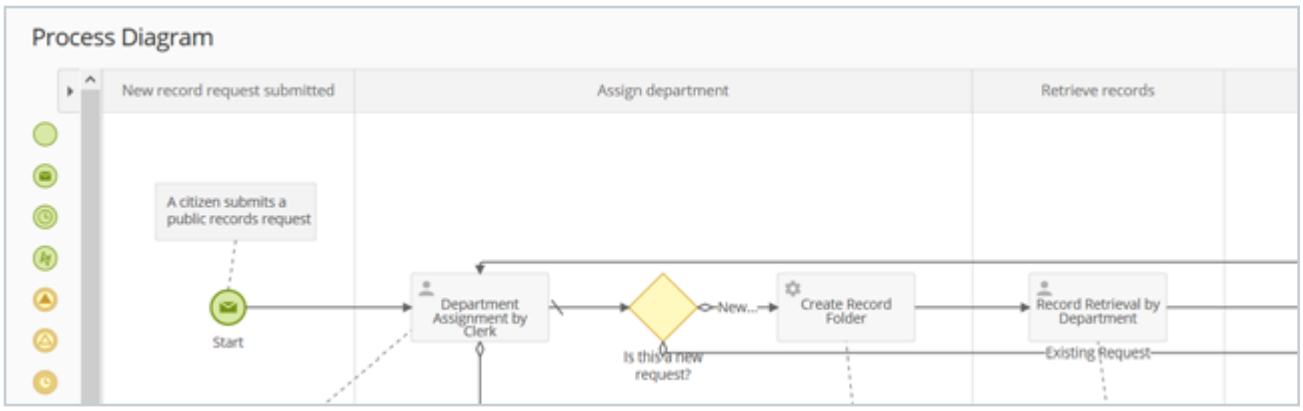
Make sure to click the **Save** button in the upper right hand side of the screen to ensure that your work is never lost. Click the **Validate** button to check to see if your process is configured correctly. To test your process, click the **Run** button.



Video: Email Notifications in Laserfiche Forms

Stages

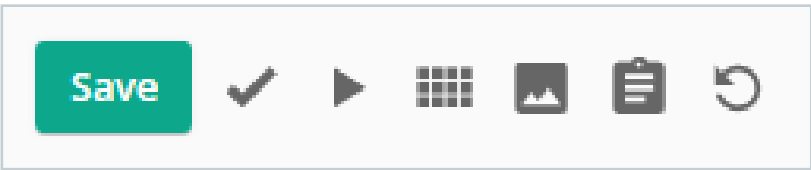
The canvas is divided into stages for organizational purposes. Name stages or add more stages by clicking on the stages bar at the top of the canvas. Expand or contract stages by dragging the thin gray bars on the canvas to the left or right. Grouping objects into stages allows for better reporting, which will be described later in this guide.



The different stages of a public records request process

Additional Options

The menu on the upper right hand side of the Process Diagram provides you with additional options:



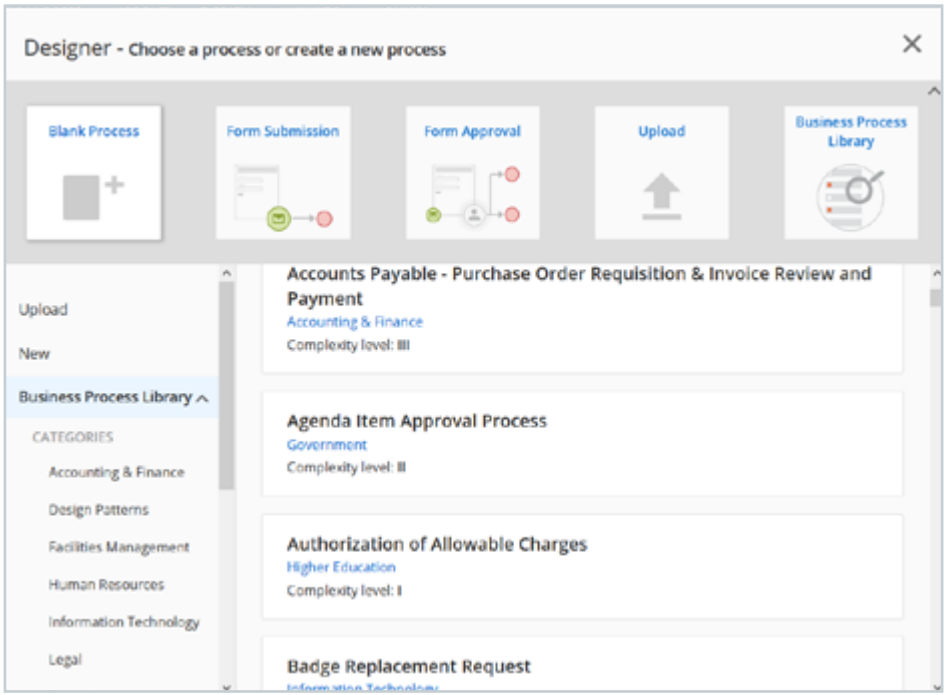
- **Deleting Activities:** Right-click an activity and select Delete
- **Auto Spacing:** Use this option to remove the space in the canvas. Does not change how the process runs
- **Downloading as an Image:** Use this option to download the process as an image to show others
- **Viewing Documentation:** Use this option to see the documentation written in right pane
- **Reverting:** Use the revert button to go back to your last saved version of the process

Business Process Library

The Business Process Library (BPL) is a digital library of prebuilt electronic form and workflow templates designed for fast process automation deployment. Each business process consists of one or more Forms processes that will be installed when you click download. These commonly used processes can be implemented immediately or customized to suit your organization's needs. The BPL includes industry-specific, department-specific, and general templates that can be used by anyone.

The BPL is an excellent place to start if you are new to Laserfiche Forms or if you are having trouble diagramming a particular process.

The BPL can be accessed from the **New Process** menu.

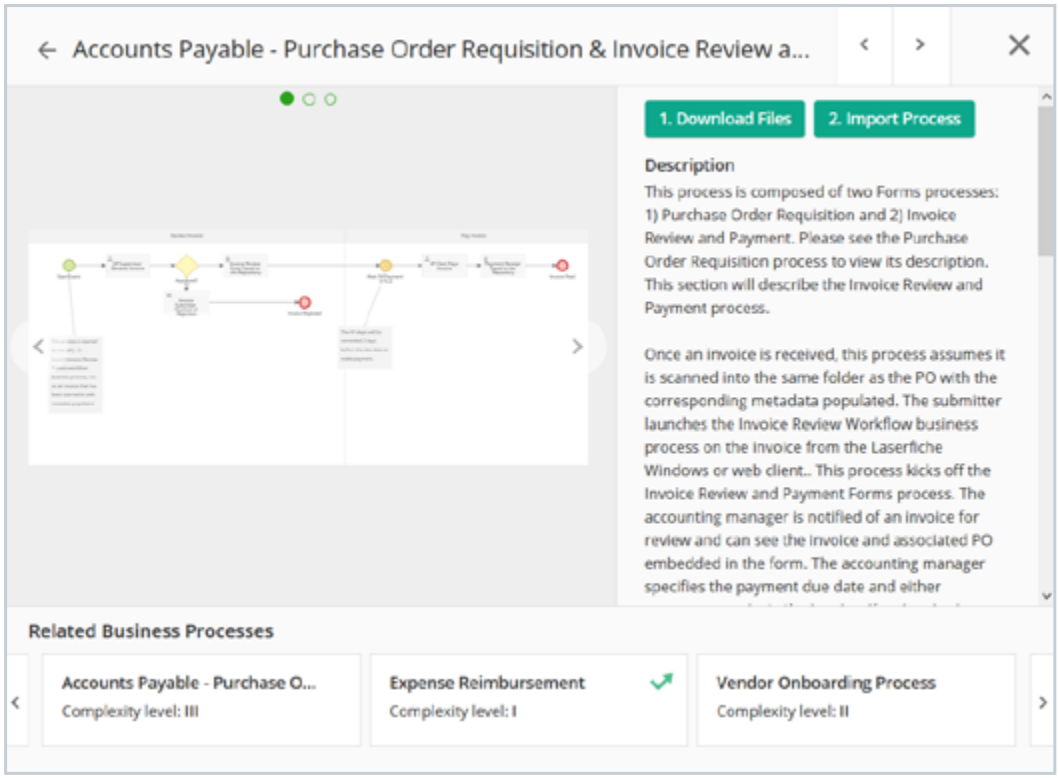


The main Business Process Library interface

If you are looking for a specific process, you can search by keyword in the search bar. You can also browse the library and view the processes by category or industry. Additionally you can sort the processes by Newest, Alphabetical, Complexity or Trending.

Downloading the Process

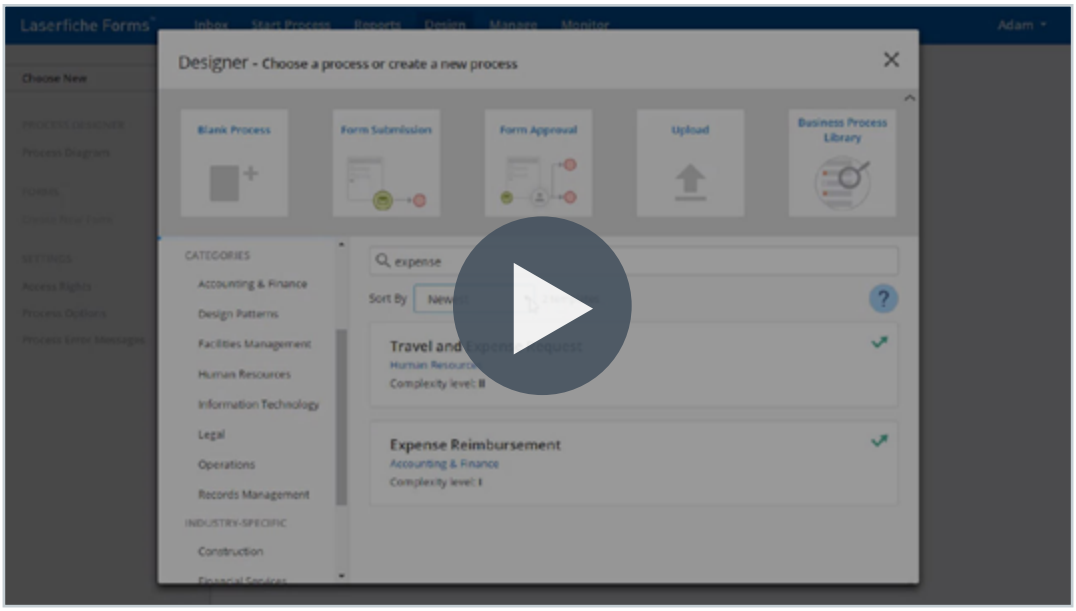
When you select a process, you will see the process diagram, a description of the process and two buttons labeled **Download Files** and **Import Process**. Click the next arrow on the process diagram to see a screenshot of the form and click again to see the process summary.



The details of an Accounts Payable process template

To use the process template, first click the **Download Files** button and download the necessary files. Then select the **Import Process** button, name the process (its name can be changed at any time) and begin using your process. Opening the process will bring you to the Process Designer page where you can configure and customize your process.

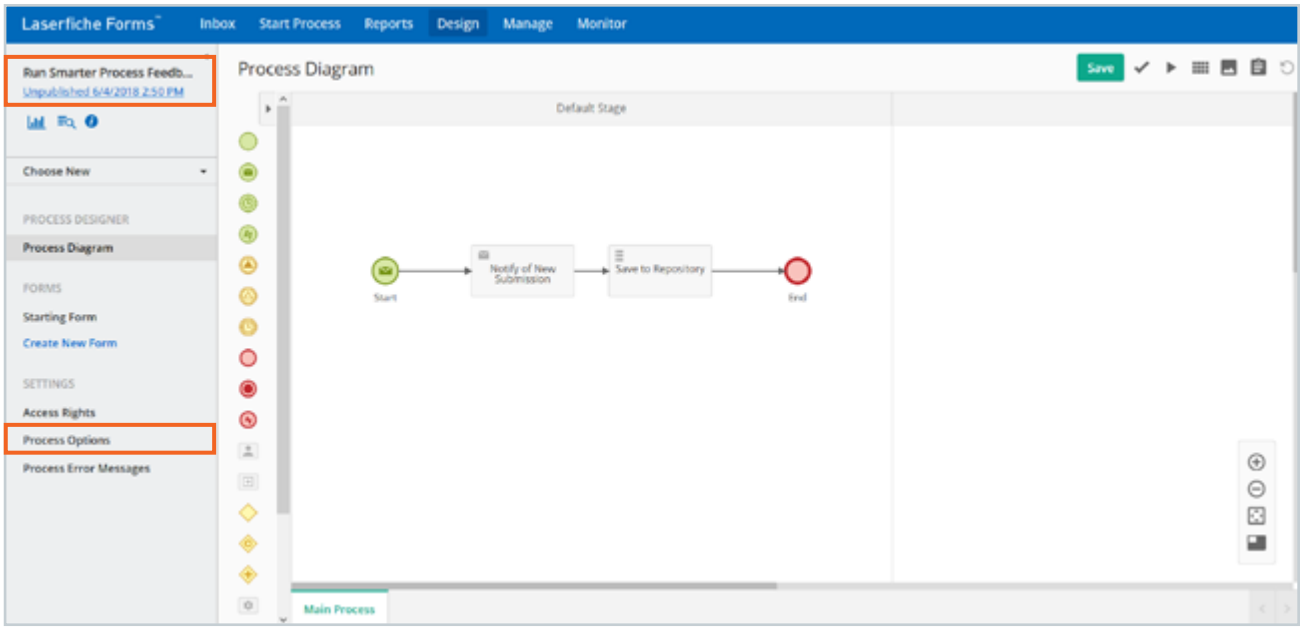
Learn more about the Business Process Library by reading the help files or browsing the Laserfiche Answers group .



Video: Business Process Library

Publishing Your Process

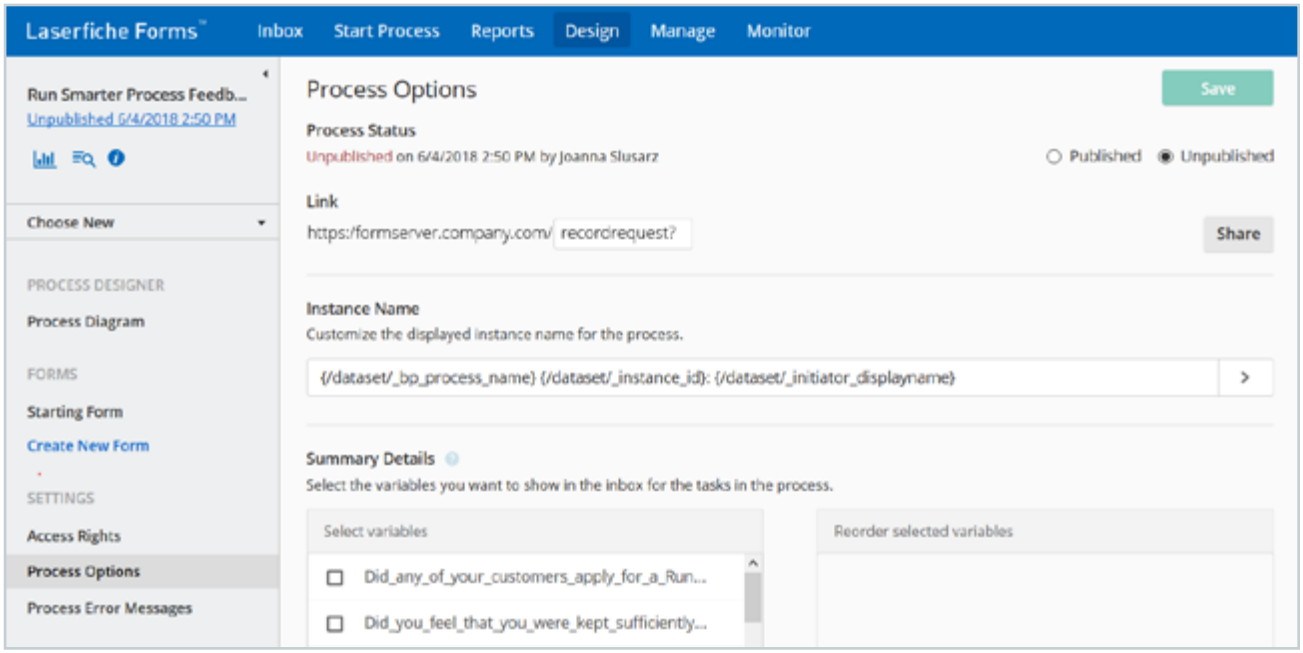
Before users can submit forms or perform the tasks that make up your business process, you must first publish it. While in the **Process Diagram** page, click either the **Unpublished** button in the top left corner or the Process Options button in the bottom left corner. This will take you to the **Process Options** page.



To publish a process, click one of the highlighted options

Process Options

By default, your process will be unpublished, meaning that only Process Administrators and Business Managers will be able to see it on the Manage page. To allow users to use your process, use the radio button to move the form from **Unpublished** to **Published**. This will cause the process to appear in the **Start Process** tab for all users who have access to it.

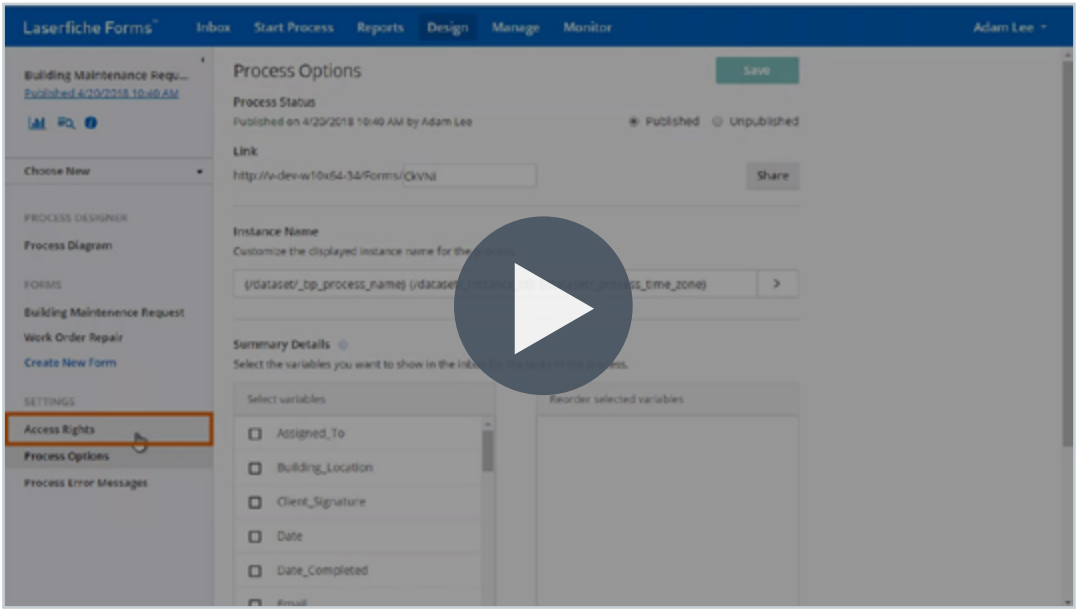


The Process Options page

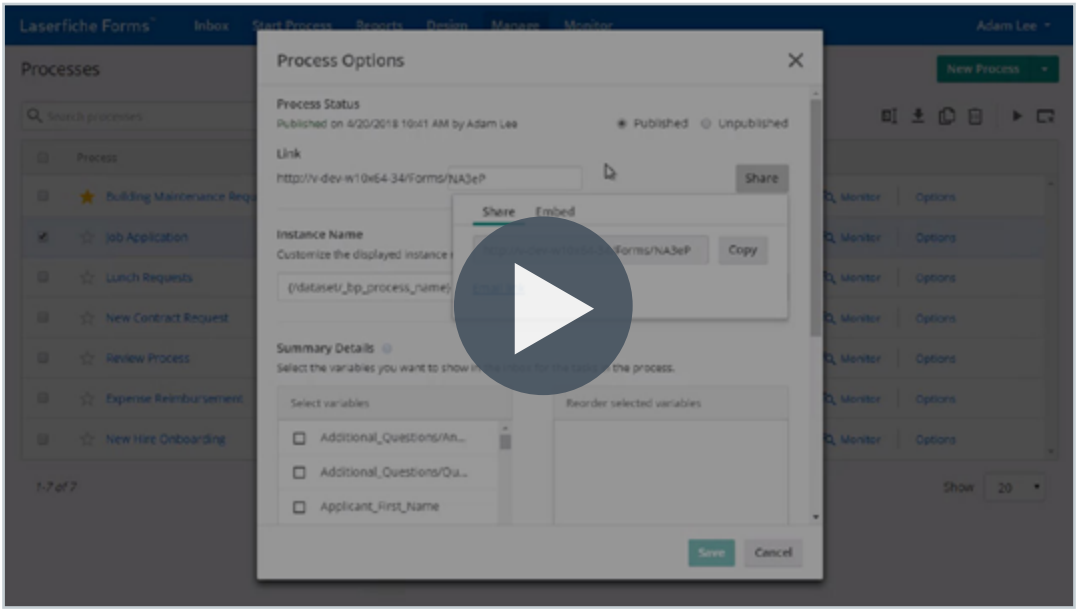
Other Options

- **Link:** You can make the link to the form more descriptive by editing the URL. Click the **Share** button to copy, email or embed the link
- **Instance Name:** After the process runs, it creates an instance of the process. Use this text box to generate a name for each process instance. You can use variables to generate a unique name for each instance, which helps users identify tasks in their inboxes and administrators troubleshoot instances on the Monitor page
- **Summary Details:** All of the variables in a form are displayed in the first box in this section. You can add them to the second box to display their values in the Inbox's Summary tab for each of the process's tasks
- **Time Zone:** Change the time zone your process will run in. This is important for events that rely on timers
- **Termination:** You can configure an email notification that notifies users when the process terminates. Use this area to specify the recipients, subject and contents of the email

For more information on publishing a process, see the Laserfiche Forms help files.



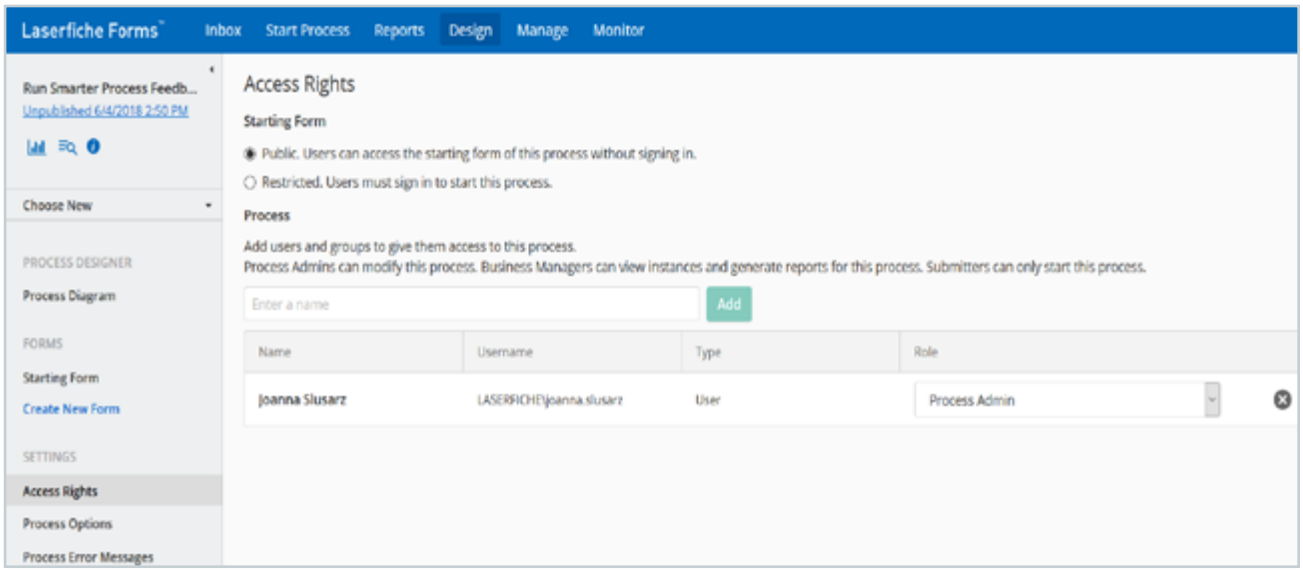
Video: Publishing a Laserfiche Forms Process



Video: Getting a Shareable Link for a Form

Access Rights

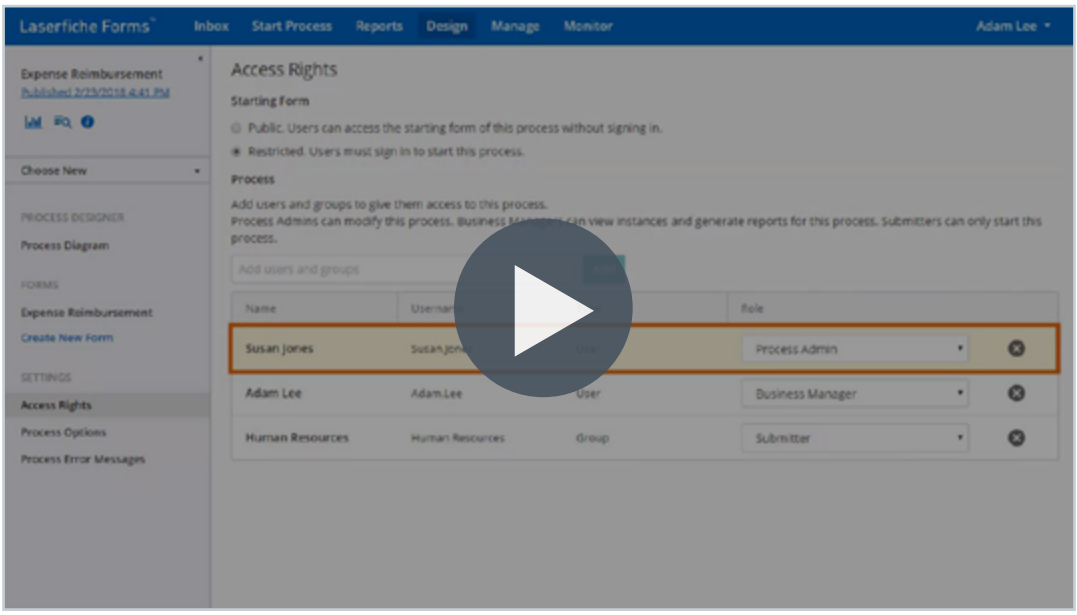
Processes are restricted, meaning that users are required to sign in in order to access them. If you have a Forms Public Portal license you can choose to leave forms as restricted or make them public, which allows non-Laserfiche users to fill out the form.



The Access Rights page

Give users or groups access to the process by typing a name into the search bar (which will autofill) and clicking **Add**. As the process creator, you are automatically assigned the role of Process Administrator. You may assign other users as Process Administrators, Business Managers or Submitters.

For more information on access rights, view the help files.



Video: Process Access Rights in Laserfiche Forms

Best Practices

- Always begin with a well diagrammed business process
- Keep your canvas as simple as possible
- Name events and activities descriptively
- Use comments to describe your process so that other users will understand
- Always use gateways for decisions with multiple outcomes
- Build your process in stages and test each stage to troubleshoot more effectively
- Save your work periodically

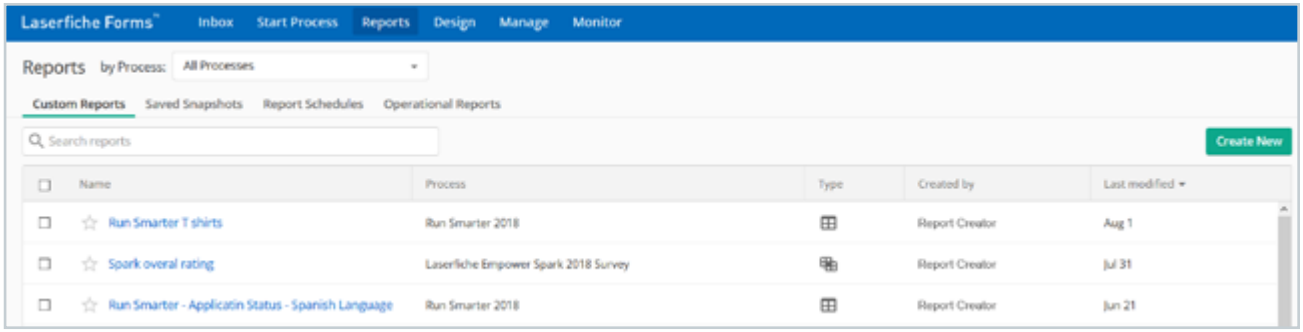
For a more in-depth list of best practices, see this section of the Laserfiche Forms help files or view this Forms best practices presentation*.

Creating and Using Reports

Viewing Reports

Note: Only Administrators, Process Creators, and Business Managers can see the Reports tab.

If you are a Process Administrator or Business Manager for a process, you can use the Reports tab to view different process data and metrics. This allows you to see where various forms are in processes, how many tasks have been submitted or completed, and view custom graphs and charts. This data can help you determine where bottlenecks or slowdowns are occurring. Additionally, you can generate visual reports that allow you to easily analyze your process data.

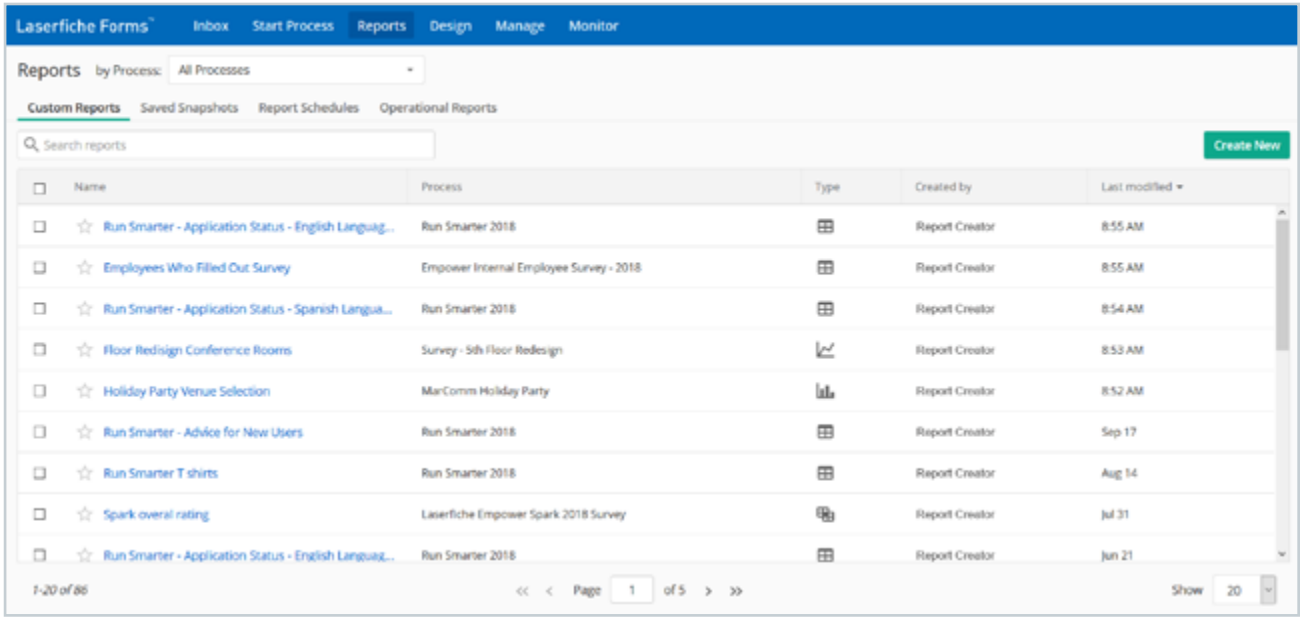


The Reports tab

The Reports tab is divided into four sections: Custom Reports, Saved Snapshots, Report Schedules and Operational Reports. You can also filter the reports by process name and search for processes using the search bar.

Custom Reports

Custom reports allow you to view data visually for a particular process.

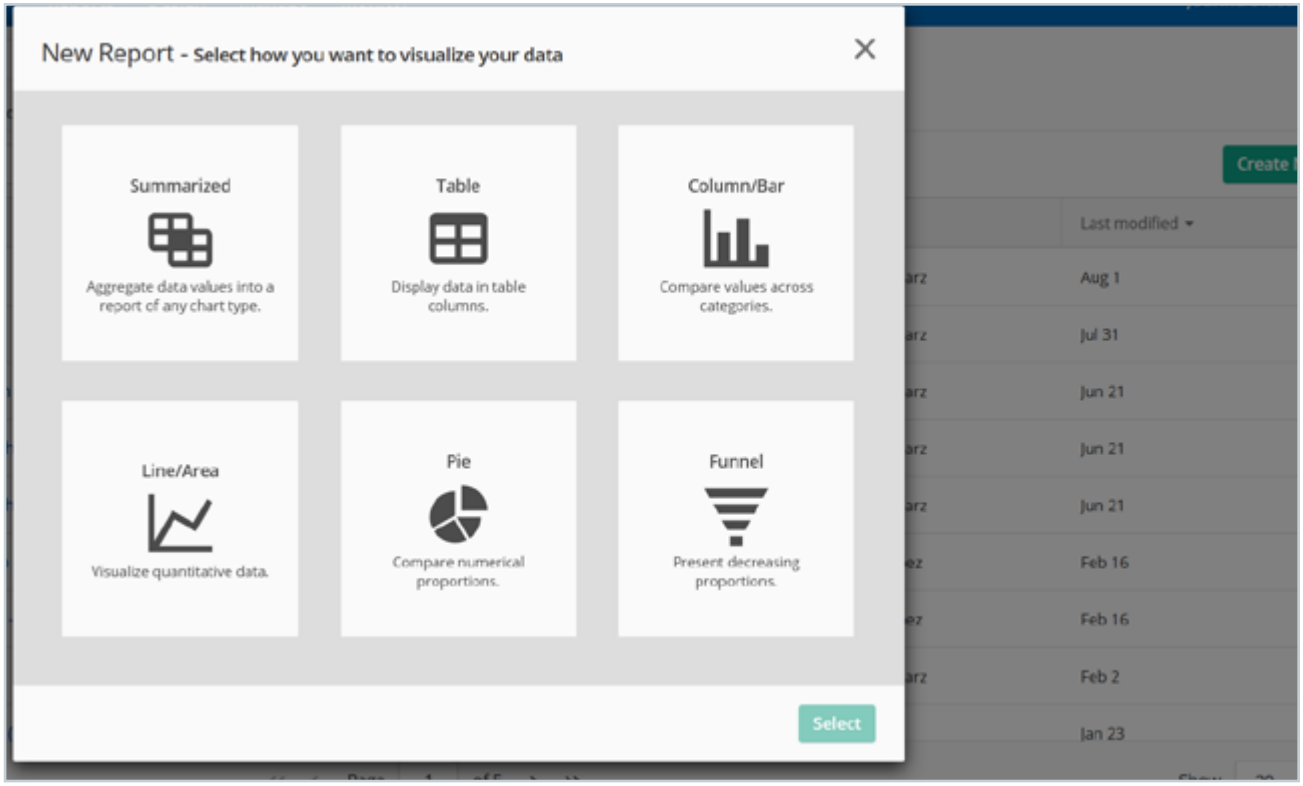


The main Reporting page interface

When you select a report, you will see buttons to edit the report, create a schedule, copy the report, download the report into a spreadsheet format, manage report access and delete the report.

For more information, view this section of the help files.

To create a new custom report, click the **Create New** button in the upper right corner. This will bring you to a page where you will select how you would like to visualize your data.



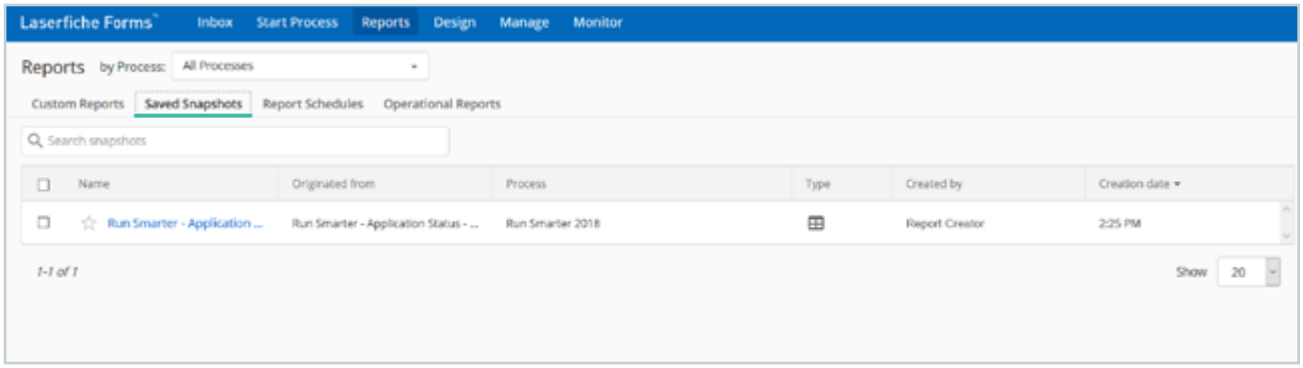
Creating a new custom report

Click the process you would like to report on and then click Create. You will be prompted to name your report and choose who the report will be visible to. For more information on how to configure each report type, see this section of the help files.

Saved Snapshots

If you would like to save your report data at a particular moment in time, use the **Save Snapshots** option.

To create a snapshot, click the **Save Snapshot** button while viewing a custom report. You will be prompted to name your snapshot and choose who the snapshot will be visible to. All of your snapshots will be automatically saved in the **Saved Snapshots** tab.

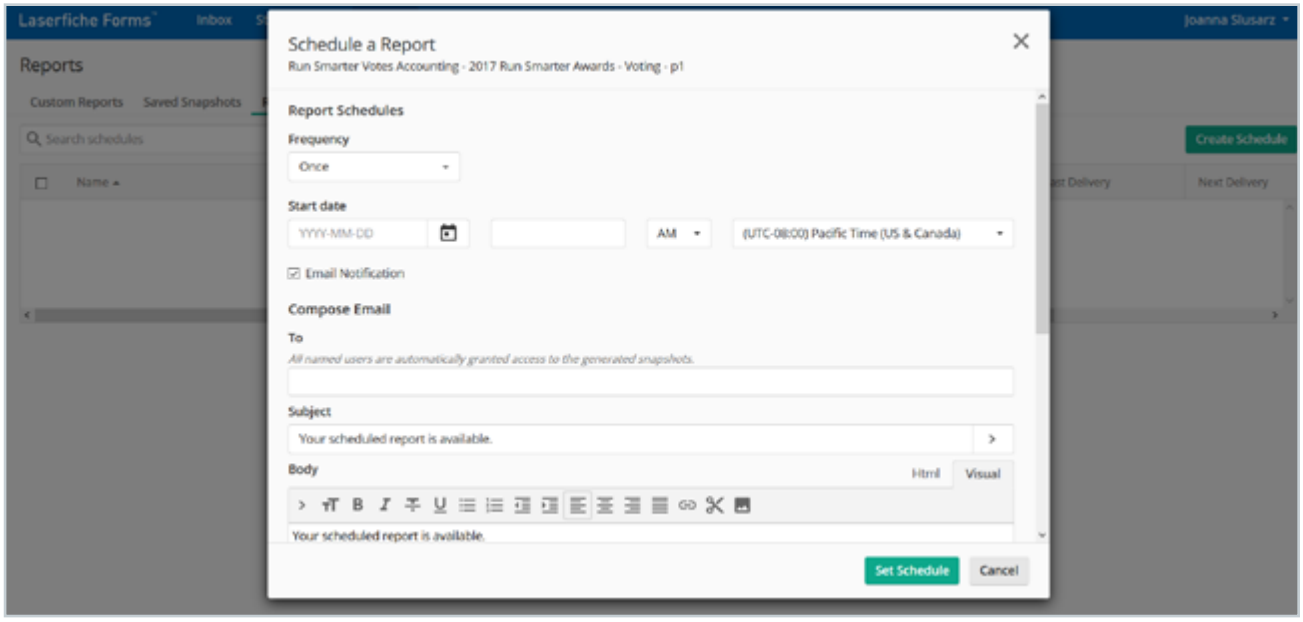


The Saved Snapshots tab

Report Schedules

You have the option to generate saved snapshots based on a schedule, instead of generating them manually. All of your scheduled snapshots will be saved in the **Report Schedules** tab.

To create a scheduled snapshot, click the **Create Schedule** button in the upper right corner of the **Report Schedules** tab. Select the existing custom report that you want use to create a scheduled snapshot. You will be prompted to set your schedule. Click **Set Schedule** to save your scheduled report.



Scheduling a new report

Operational Reports

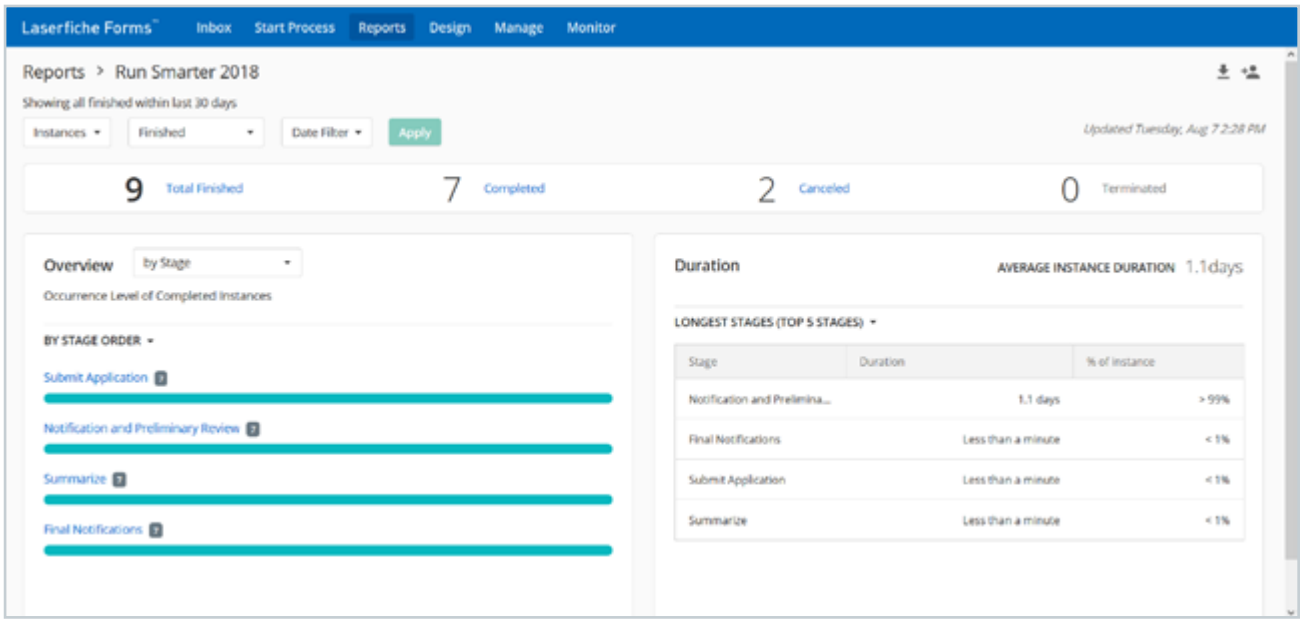
Use the **Operational Reports** tab to find data about a single process, including the average duration of a task, how many tasks have been completed, how many tasks are overdue and more. This tab can be used by administrators to troubleshoot processes or to assist in assigning workloads.

The **Operational Reports** tab will have a list of all of your processes. Select one to view the associated operational report.

The operational report shows you information such as:

- How many processes are currently running
- The step in each process that an instance is located
- The average process duration

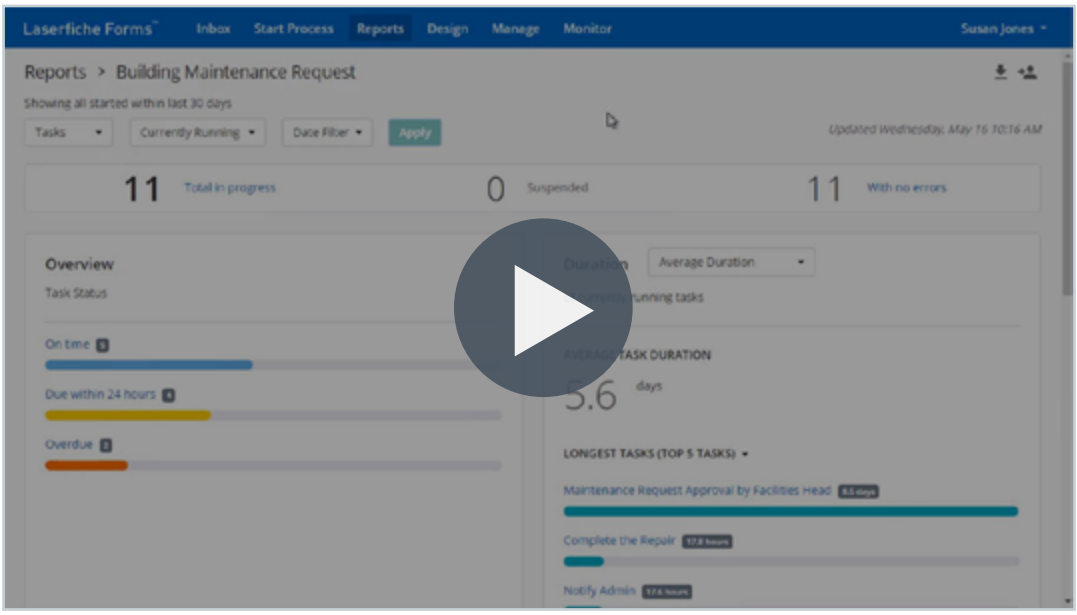
You can filter this information by selecting the drop-down menus in the upper left corner.



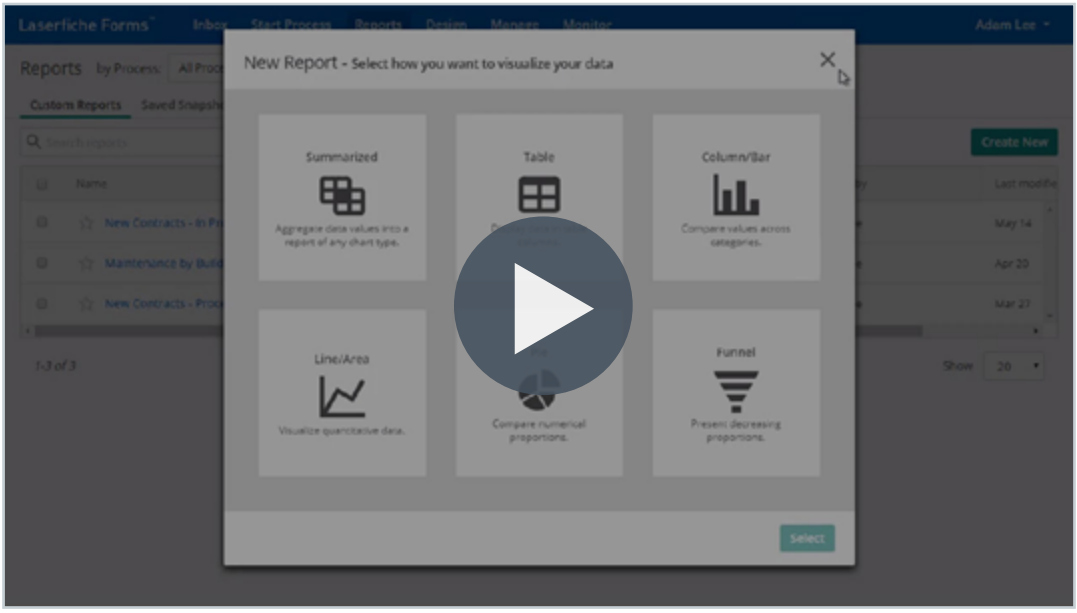
An example of an Operational Report

- The **Overview** section lets you know how many instances are at each point in the process
- The **Duration** section can let you know which tasks are likely to become overdue
- The **Distribution** section shows who has completed the most tasks by both individual users and by teams

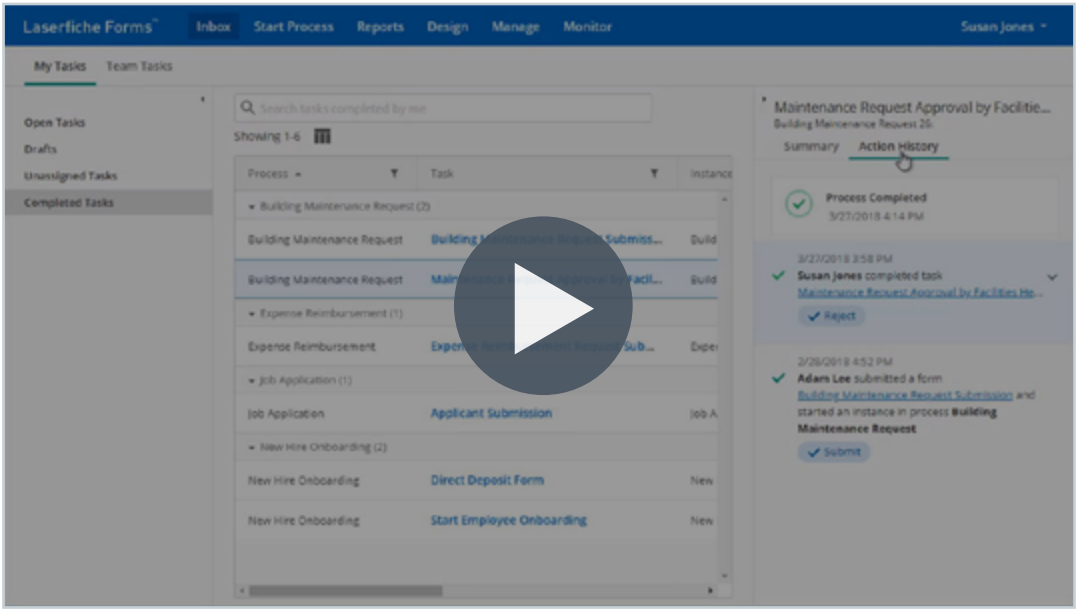
Click an instance to view detailed information about the process.



Video: Operational Reports in Laserfiche Forms



Video: Reporting in Laserfiche Forms

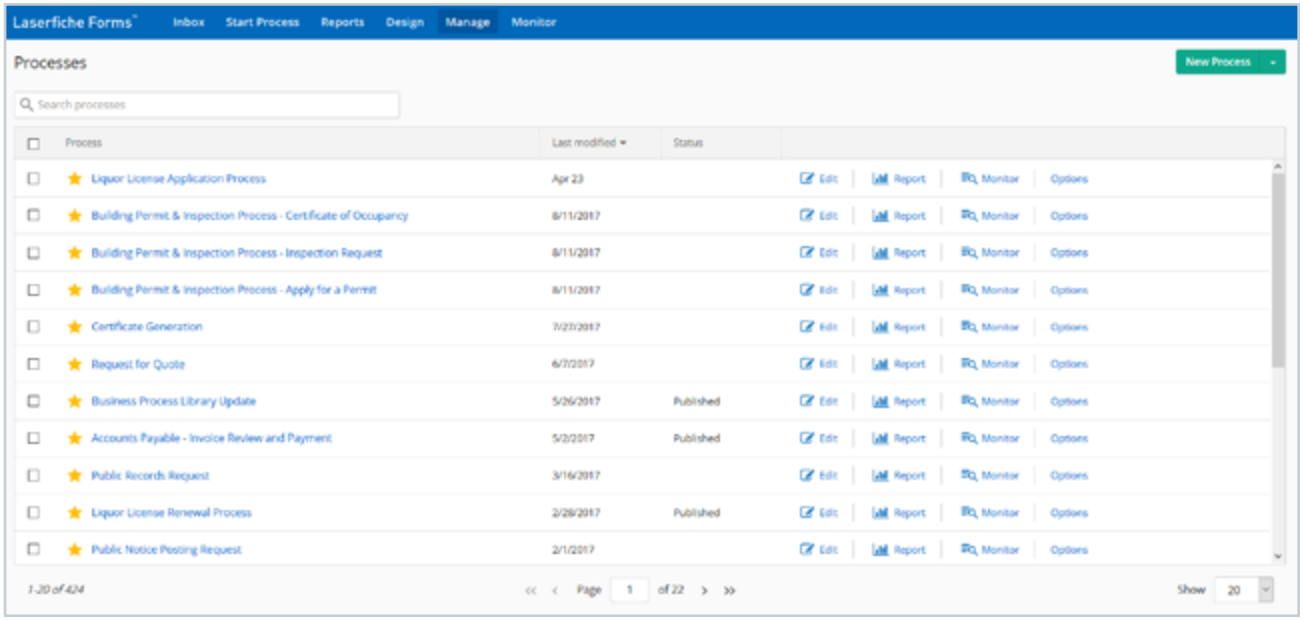


Video: Checking the Status of a Forms Process

Managing and Administering Forms Processes

Use the **Manage** page to manage your business processes or create new ones

Note: Only Administrators, Process Creators and Business Managers can see the Manage tab.



The Manage page

All processes for which you are a Process Administrator or Business Manager will appear in this tab. Search for specific processes by keyword in the search bar or sort alphabetically, chronologically or by process type.

Here are the options that you can perform from this page:

- **Edit:** Opens the Design tab for editing the process
- **Report:** Opens the Operational Report tab to view details about the process's performance
- **Monitor:** Opens the Monitor tab to view instance details for the process
- **Options:** Opens the Process Options page for the process

If you select one or more of the processes, a menu will appear on the upper right hand side which will present you with the following options:

- **Rename:** Provide a new name and description for the process
- **Download:** Download the process in XML format
- **Make a copy:** Duplicate the process with the text "Copy" appended to the new process's title
- **Delete:** Delete the process and its forms entirely
- **Run:** Run the process
- **Publish/Unpublish:** If the process is unpublished, you can publish it. Otherwise, you can unpublish it

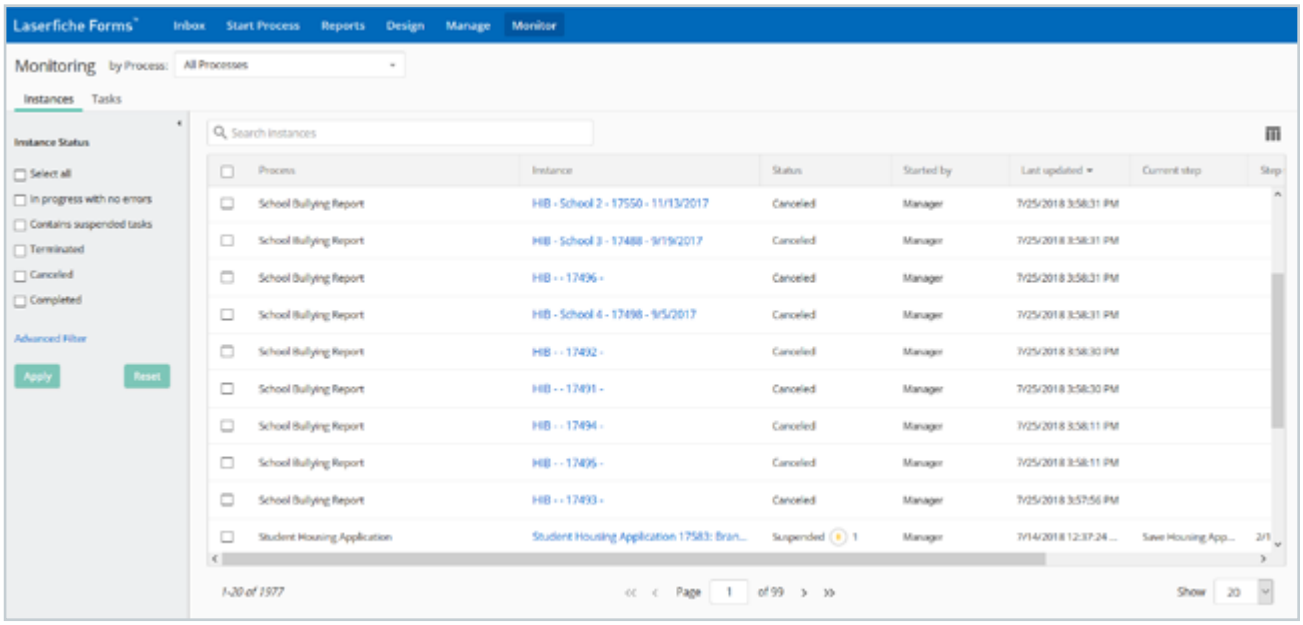
Pin frequently used processes to the top of your list by clicking the star to the left of the process name.

Additionally, you can create or import a new process from this page by clicking the **New Process** button in the upper right corner.

Monitoring Instances

Note: Only Administrators, Process Creators, and Business Managers can see the Monitor tab.

The **Monitor** page contains details about each time a business process runs and all related form submissions. Use this tab to troubleshoot processes or get a quick look at all process instances.



The Monitor page

The Monitor page contains all instances of processes that you have access to view. View by instance or by task. Search for specific instances using the search bar or filter. The filter options are:

- Select all
- In progress with no errors
- Contains suspended tasks
- Terminated
- Canceled
- Completed

You can also click on **Advanced Filter** to filter by other options such as start date and process initiator.

To view individual instances, double click the process instance. You will be taken to the instance's action history.

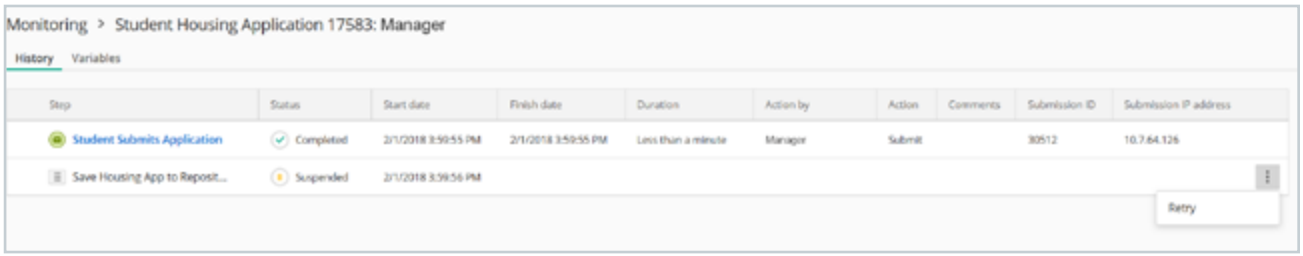
History Variables

Step	Status	Start date	Finish date	Duration	Action by	Action	Comments	Submission ID
Start	Completed	3/14/2018 4:59:50 PM	3/14/2018 4:59:50 PM	Less than a minute	Manager	Submit		30596
Review by Gift Processing T...	Completed	3/14/2018 4:59:50 PM	3/14/2018 5:00:06 PM	Less than a minute	Manager	Approve		30597
• The task was assigned to Grace Ding - 3/14/2018 4:59:50 PM								
Review by Development Off...	Completed	3/14/2018 5:00:06 PM	3/14/2018 5:00:27 PM	Less than a minute	Manager	Submit		30598
• The task was assigned to Grace Ding - 3/14/2018 5:00:06 PM								
Is gift amount over $10K?	Completed	3/14/2018 5:00:27 PM	3/14/2018 5:00:27 PM	Less than a minute				
Review by President's Office	Completed	3/14/2018 5:00:27 PM	3/14/2018 5:00:41 PM	Less than a minute	Manager	Submit		30599
• The task was assigned to Grace Ding. The priority is: High - 3/14/2018 5:00:27 PM								
Generate Thank You Letter/T...	Completed	3/14/2018 5:00:41 PM	3/14/2018 5:00:41 PM	Less than a minute				
Save to Laserfiche	Completed	3/14/2018 5:00:41 PM	3/14/2018 5:00:43 PM	Less than a minute				

The action history of a process instance

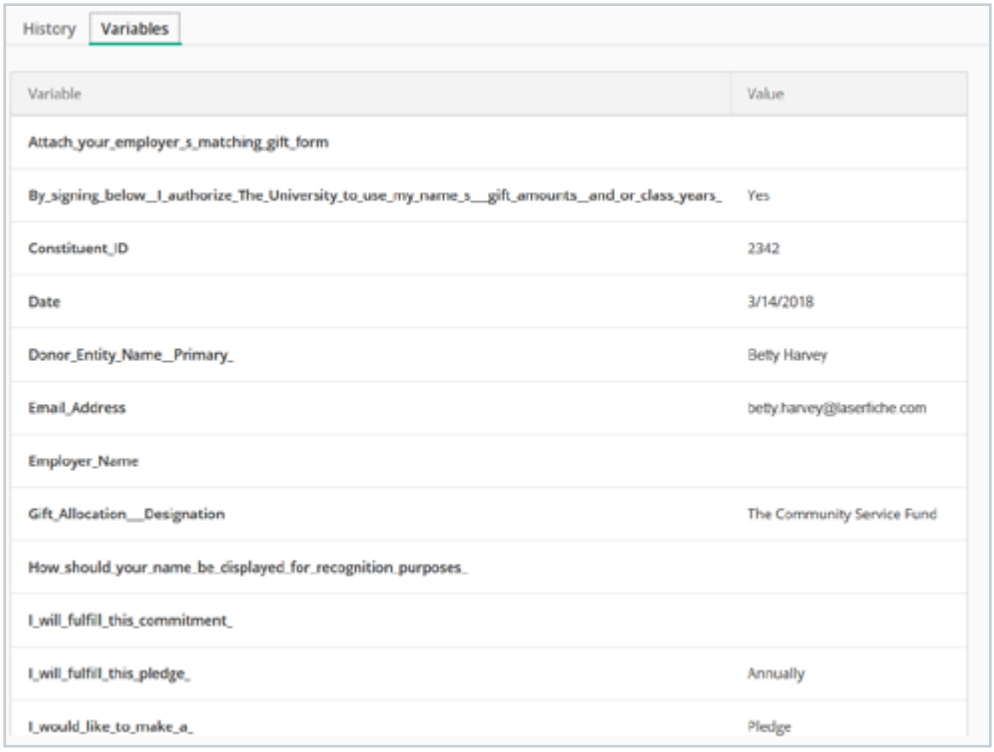
This will list all of the instances actions and whether or not each task has been completed. It includes information like when the task began and how long the task took. Double-click the step name to expand the task, allowing you to see more information like the users assigned to the task, and to view the submitted form.

If a service task is suspended, you can retry it by clicking the **More Options** button and selecting **Retry**.



Retrying a suspended instance

Select the Variables tab to see a list of all the field variables in the process and their values.



The list of all variables used in a process instance

From the **Monitor** page you can also:

- **Stop instances:** Select the instance(s) you would like to stop and click the Stop button
- **Delete terminated instances:** Select the instance(s) you want deleted and click the Delete button
- **View operational reports:** Select the instance you want to view a report for and click the Reports button

From within a specific instance you can also:

- **Reassign tasks:** Click the More Options button and select Reassign
- **Change task priority:** Click the More Options button and select Edit priority
- **Change due date:** Click the More Options button and select Edit due date

For more information, see this section of the help files.

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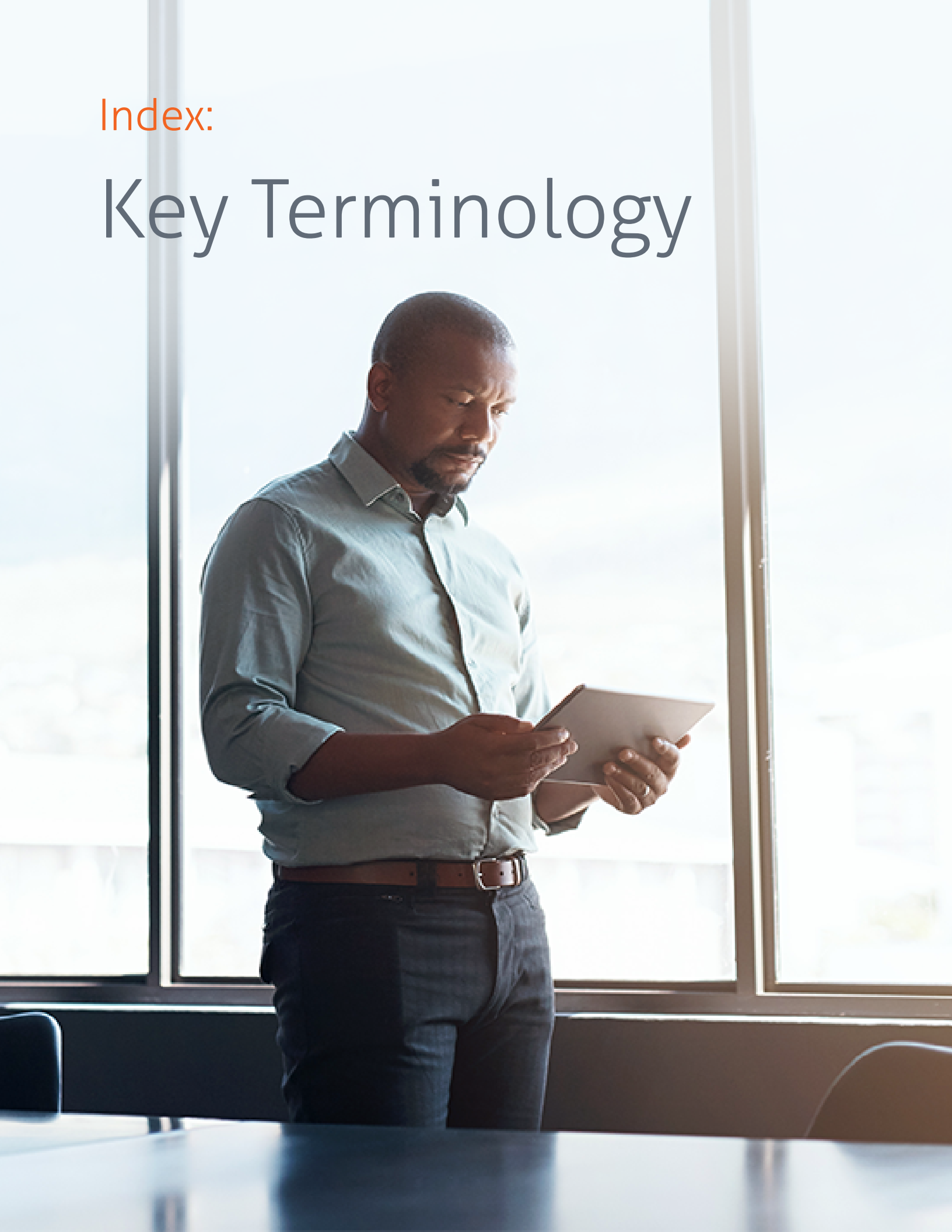
Key Terminology



Activity

Activities are tasks performed by users or applications. In the Forms Designer, there are two types of activities: user tasks and service tasks.

Business Manager

A Business Manager is a user who can start processes; view, create, edit, and share reports; take snapshots; edit process instance names; cancel process instances; and complete and reassign tasks. Business managers cannot design processes or delete instances.

Business Process Library

The Business Process Library is a collection of prebuilt processes and accompanying forms tailored for a variety of business needs. Each business process consists of one or more Forms processes that will be installed when you click download.

Canvas

The canvas is the area where you can drag and drop actions or fields. There are two canvases in the Forms Designer: the Process Diagram canvas where you will drag objects to create a process and the Forms Layout canvas where you will drag fields to create a form.

Drafts

A draft is a partially completed form. Saved drafts are stored in the Drafts tab of the Forms Inbox.

Event

Events are similar to activities but they do not necessary need a user action to run. Forms has three types of events: start events, intermediate events, and end events. Start events are the mechanism for starting a business process, intermediate events happen during a process, and end events stop a business process after it has finished running.

Fields

Fields are the sections of a form that collect user information. These can include single line fields, address fields, radio buttons, drop downs, signatures and more.

Instance

An instance is a specific single run of a process. This includes all of the tasks that have been or will be completed.

Outflow path

Outflow paths are the connections between objects in processes. They dictate the flow of the process and can be either unconditional or conditional.

Process

A process is all of the forms, events and activities that make up a business process. Whenever a process is run, it generates an instance of the process.

Process Administrator

A Process Administrator is a user who can start processes, modify the processes, view process details, and create reports. They can also reassign tasks from the results page. By default, the user that creates a process is its Process Administrator.

Submitter

A Submitter is a user who can start processes, either by submitting a form or by starting a process manually. In the Completed Tasks section of their Inbox, submitters can also see information about processes they have participated in.

Task

A task is an action to be completed either by a user or an application.

Team

A team is a group of users, all who have access to the same pool of tasks.

Variable

A variable is container for process and field information. When a process runs, variables store information specific to that process instance.

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Additional Resources

Resources marked with an asterisk (*) require a free Laserfiche Account to access. You can create the free account here.

- The Laserfiche Online User Guide and Help Files* contains a comprehensive overview of all Laserfiche functionality
- The Laserfiche Video Tutorial gallery* includes various instructional videos on many Laserfiche topics
- The Laserfiche Getting Started Guides are filled with information to help you get started with Laserfiche software
- The Laserfiche Solution Exchange comprises a number of real world customer use-cases of Laserfiche, including screenshots of implementations
- Laserfiche Answers* is a question and answer forum where Laserfiche users, solution providers and developers interact. You can search to see if someone has already answered a question that you have, and if not, ask it to receive answers from the community. Join Laserfiche Answers groups based on industry or common interest to share ideas with like-minded individuals
- The Laserfiche Certification Program encompasses a number of comprehensive online training courses to help you get certified in various aspects of Laserfiche software

- The Laserfiche Learn and Support Site* contains white papers, videos and presentations on various topics to provide an in-depth look at different Laserfiche functionality. You can use the comprehensive search functionality or filter by product
- The annual Laserfiche Empower Conference* allows you to choose from more than 250 sessions and hands-on labs taught by industry experts, Laserfiche engineers, and customers on all topics related to Laserfiche. You can also test drive the newest features of the Laserfiche product line
- Regional User Groups are held all around the world and help users network, exchange tips and tricks, and learn about new features
- Regional Training*, which includes certified Laserfiche training classes, is held around the world. Learn how to take full advantage of your Laserfiche system, and use new products and features

Laserfiche®

Join the Laserfiche Community

Laserfiche Answers is a community-driven web forum where Laserfiche users from all around the world share their knowledge and expertise.

Join Laserfiche Answers