

Advanced Forms

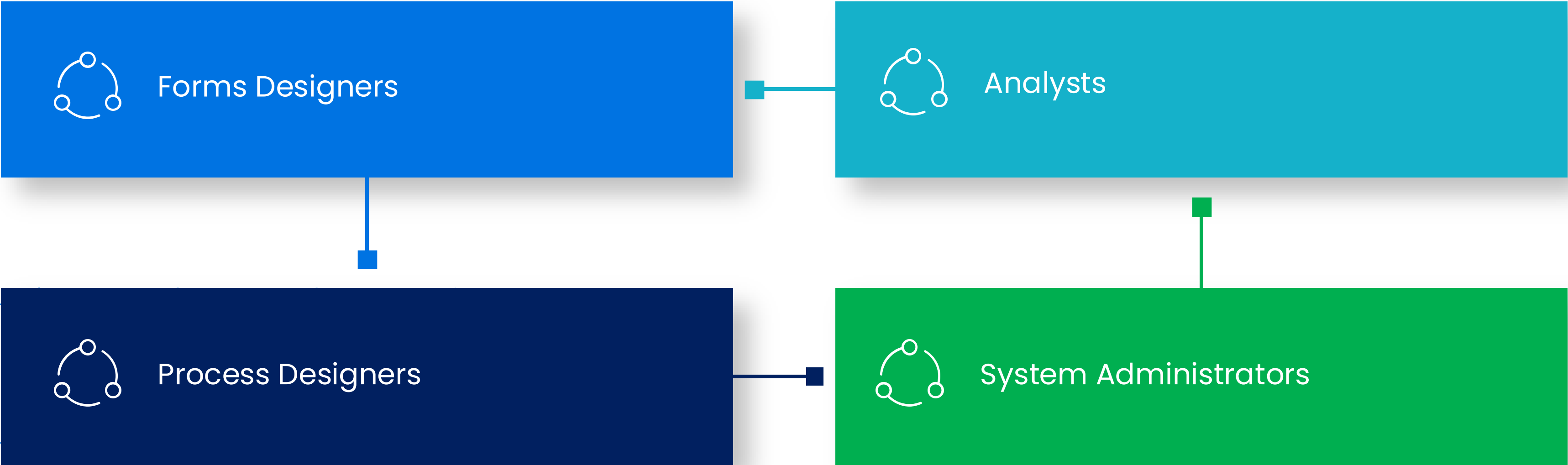
A DEEPER DIVE INTO THE FUNCTIONS
AND TRICKS OF LASERFICHE FORMS BUILDING

| Jessica Bruce
SOLUTIONS LEAD

| Tammy Preston
CUSTOMER SUCCESS MGR

Advanced Forms

Audience



Advanced Forms

Agenda

Topics Covered:

Building Forms

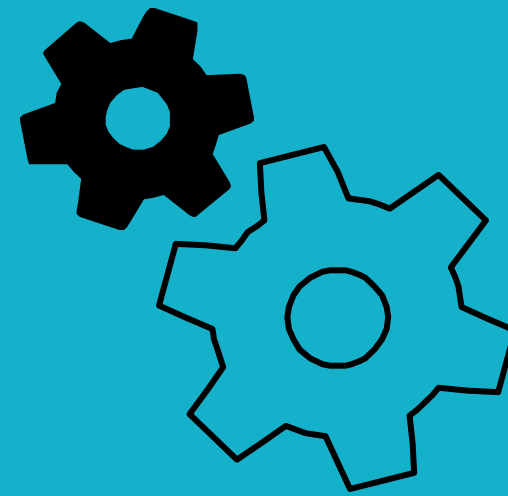
- Variables
- CSS/Javascript
- Old vs New Designer

Process Design

- Gateways
- Throw and Catch Events
- Documentation View

Teams

- Dynamic Filters



Building Forms

Forms Variables

Fields

Variables

Show All

☐

I

Current_Step

⚙

☐

I

Emp_Dept

⚙

☐

📅

Emp_DOB

⚙

☐

I

Emp_Email

⚙

☐

I

Emp_EmpID

⚙

☐

I

Emp_FirstName

⚙

☐

I

Emp_LastName

⚙

☐

I

Emp_Type

⚙

☐

I

OBID

⚙

☐

I

OBP_FormID

⚙

☐

📄

Acceptance

⚙

Variable Settings

Acceptance

📅

Date

✕

I

Name

✕

☑

Accept

✕

I

Employee_ID

✕

📅

Acceptance_Date_of_Birth

✕

The following forms use this variable:

•

Template

Delete

Done

Cancel

Edit/Delete Variables

New Designer

Variable Management

Q

Search variables

Name ▲	Type
☒ Additional_Information_	Multi-line
☒ Applicant_Info	Table
☒ Applicant_Start_Contract_Info	Table
☐ Applicant_Start_Hiring_Info	Table
☐ Applicant_Start_Info	Table

This is my customer HTML FIELD

Done

Duplicate

Delete

Basic

Advanced

Content

Html

Visual

>

<!--Comment--><p style="text-align: center;"><i>This is my customer HTML FIELD</i></p>

Layout

Field Rules

Lookup Rules

Error Messages

Themes

CSS and javascript

Field rules show or hide fields based on other field values. [Learn more](#)

↑

1

↓

Show

When any

of the follow

<!--Comment--><p style="text-...

Default Page

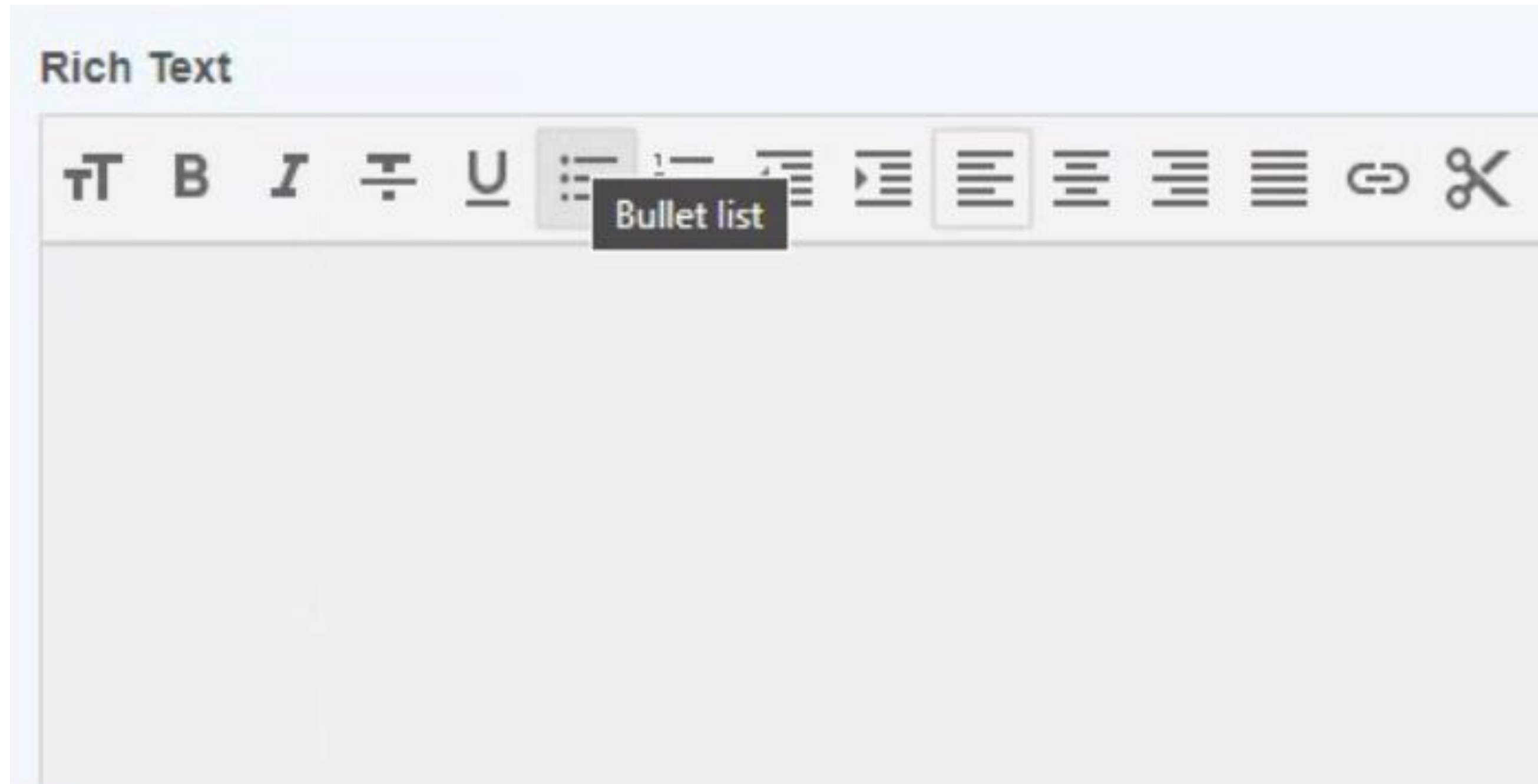
Signature

and

Ignore the data when the field...

+

Custom HTML



Rich Text

01

CSS

1 .inline {display:inline-block; vertical-align:top

2 .cssid {width: 140px;}

3 .cssname {width: 240px;}

4 .cssdept {width: 320px;}

5 .csstranslate {width: 160px;}

6 .inline15 {width: 125px;}

7 .inline20 {width: 170px;}

8 .inline25 {width: 235px;}

9 .inline35 {width: 335px;}

10 .inline45 {width: 450px;}

11 .lblhide>li>label {display: none;}

12 .linehide .cf-section-header {display: none !important;}

13 .fieldhide {display: none !important;}

14 select {height:26px !important;}

15 input {height:26px !important;}

16 .checkpic {text-align:center;}

Employee ID*

Done

First Name*

BasicAdvanced

CSS class

inline cssid empid dobcheck

02

Drag and Drop

Theme

Themes

Styles

CSS

Note: Please use caution when adding custom CSS. Using this feature may cause your form to behave unexpectedly.

CSS

```
1 .orange {background-color: orange;}
2 .green {background-color: lightgreen;}
3 .red {background-color: red;}
4 .box {border: 2px solid;}
5 .notitle .section-title {display:none;}
6 .greenmoney input {background-color:lightgreen !important;}
7 .redmoney input {background-color:red !important;color:white;}
8 .orangemoney input {background-color:orange !important;}
9 .softyellow input {background-color: #fdfd96 !important;}
10 .collection-header-yellow.cf-collection-block .cf-section-header {background-color: #f
```

CSS

JavaScript

[Learn more](#)

```
1 $(document).ready(function () {
2     $('.ro input').attr('readonly', 'True');
3     $('.ro select').attr('readonly', 'True');
4     alert('Hello Class');
5
6     var curstep = $('.stepname').text();
7     $('.currentstep input').val(curstep).trigger('
8
9     $('.dobcheck').on('blur', 'select', fillinfo);
10    $('.dobcheck').on('click', fillinfo);
11    $('.dobcheck').on('change', fillinfo);
12
13    if (!$('.obid input').val()) {
14        $('.empid input').removeAttr('readonly');
15    } else {
16        $('.empid input').attr('readonly', 'True')
17
18    fillinfo();
19
20    function fillinfo() {
21        $('.ro input').removeAttr('readonly');
22        $('.ro select').removeAttr('readonly');
23
24        if ($('.dob input').val() != $('.sigdob input
25            $('.doberror').show();
26            $('.Submit').hide();
27        }
28        else {
29            $('.doberror').hide();
30            $('.Submit').show();
31        }
32
33        $('.ro input').attr('readonly', 'True');
34        $('.ro select').attr('readonly', 'True');
35    }
36
37 });
```

documents.garlandisd.net says

Hello Class

OK

Javascript

Theme

Themes

Styles

CSS

Note: Please use caution when adding custom CSS. Using this feature may cause your form to behave unexpectedly.

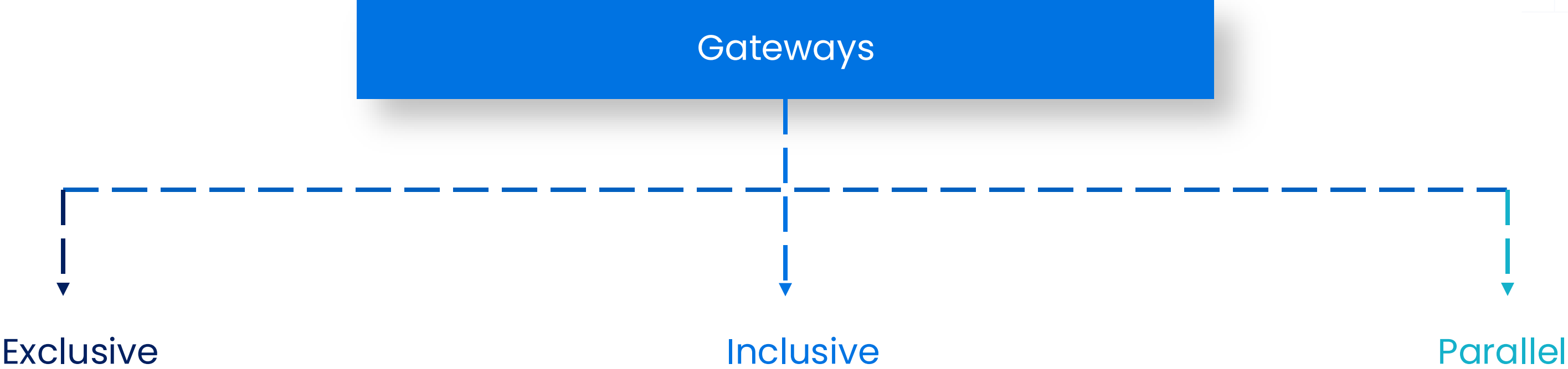
CSS

```
1 .orange {background-color: orange;}
2 .green {background-color: lightgreen;}
3 .red {background-color: red;}
4 .box {border: 2px solid;}
5 .notitle .section-title {display:none;}
6 .greenmoney input {background-color:lightgreen !important;}
7 .redmoney input {background-color:red !important;color:white;}
8 .orangemoney input {background-color:orange !important;}
9 .softyellow input {background-color: #fdfd96 !important;}
10 .collection-header-yellow.cf-collection-block .cf-section-header {background-color: #f
```

CSS



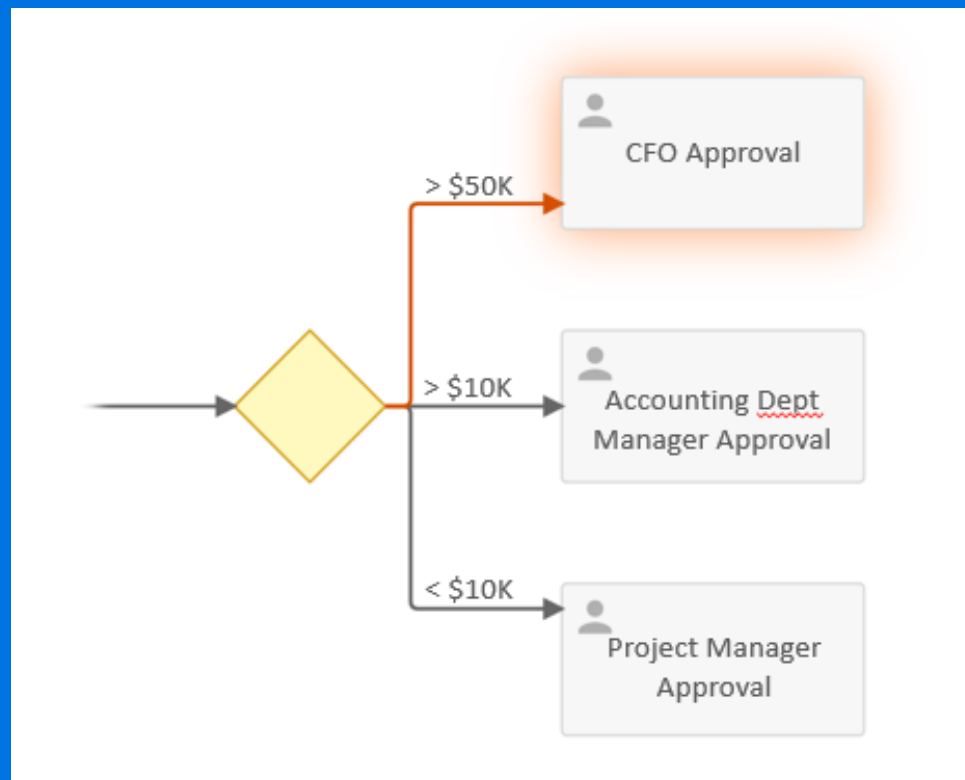
Process Design



Exclusive

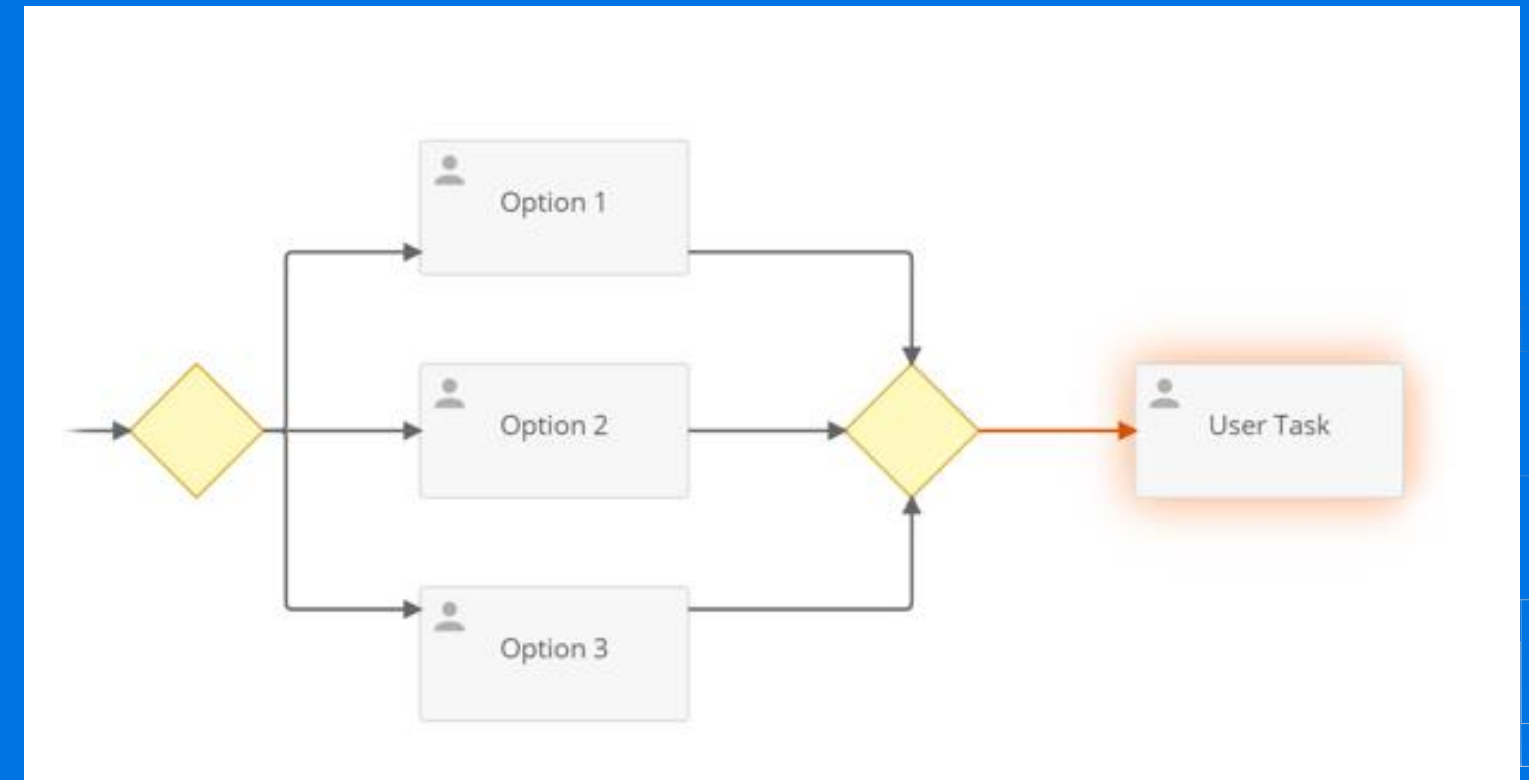
Splitting

Takes a single path.



Merging

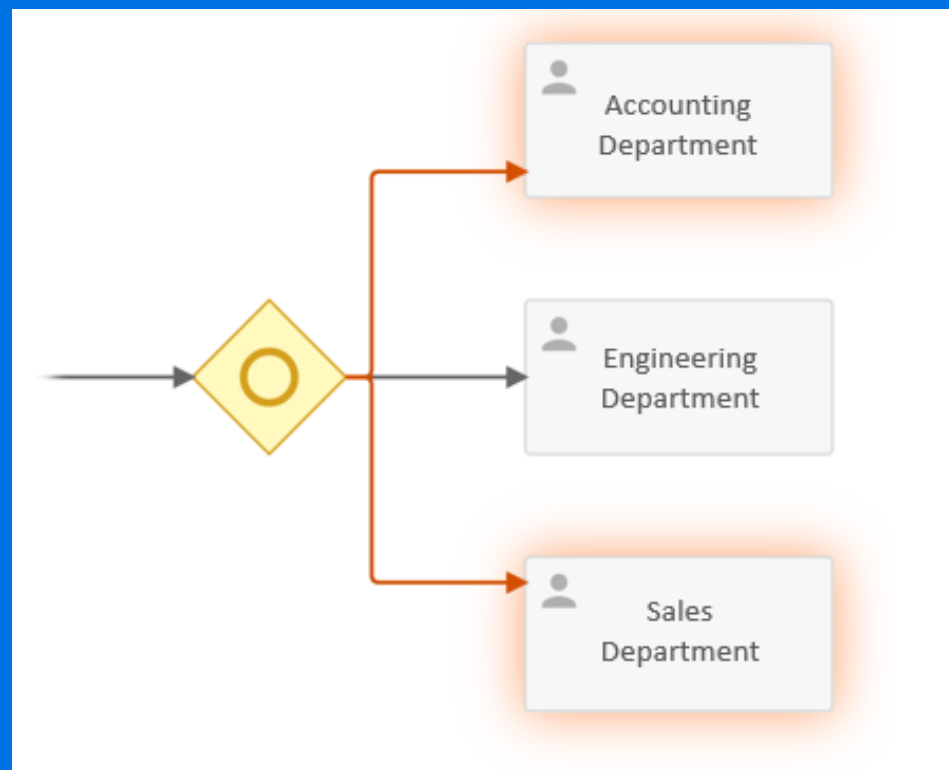
Proceeds without waiting.



Inclusive

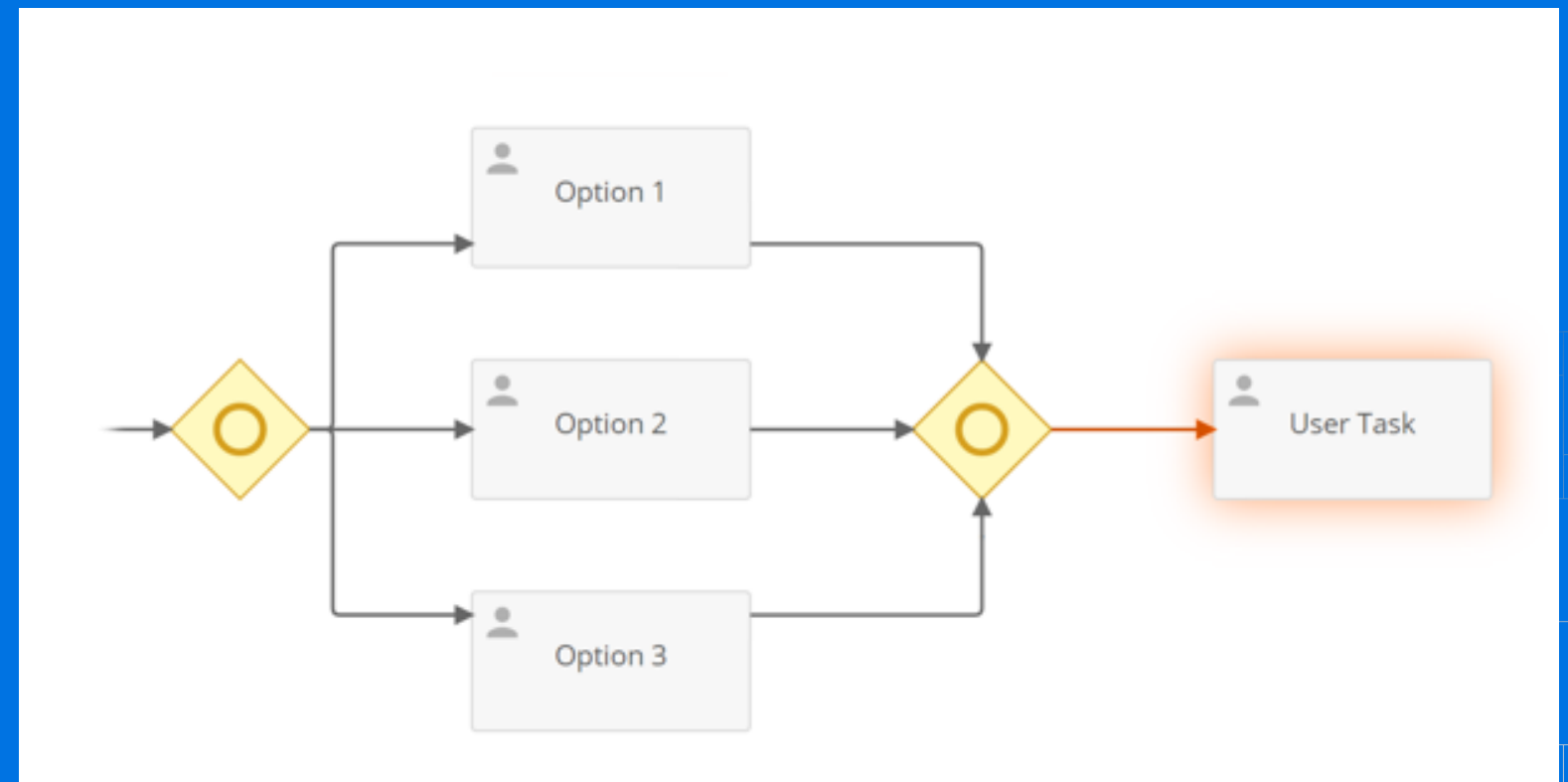
Splitting

Many paths as eligible.



Merging

Waits for all active flows.



Parallel

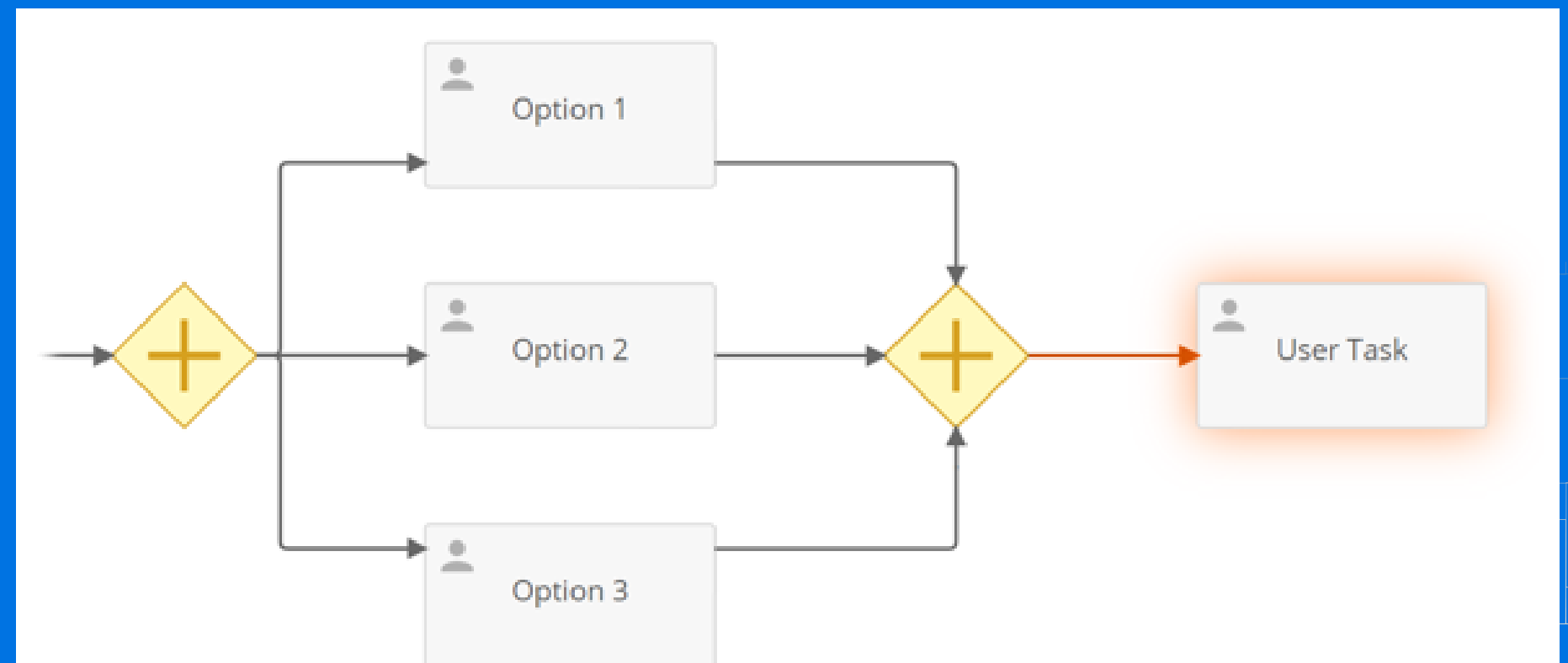
Splitting

Takes all paths.



Merging

Waits for all flows.



01

Single Throw Events broadcast a signal to the process.

02

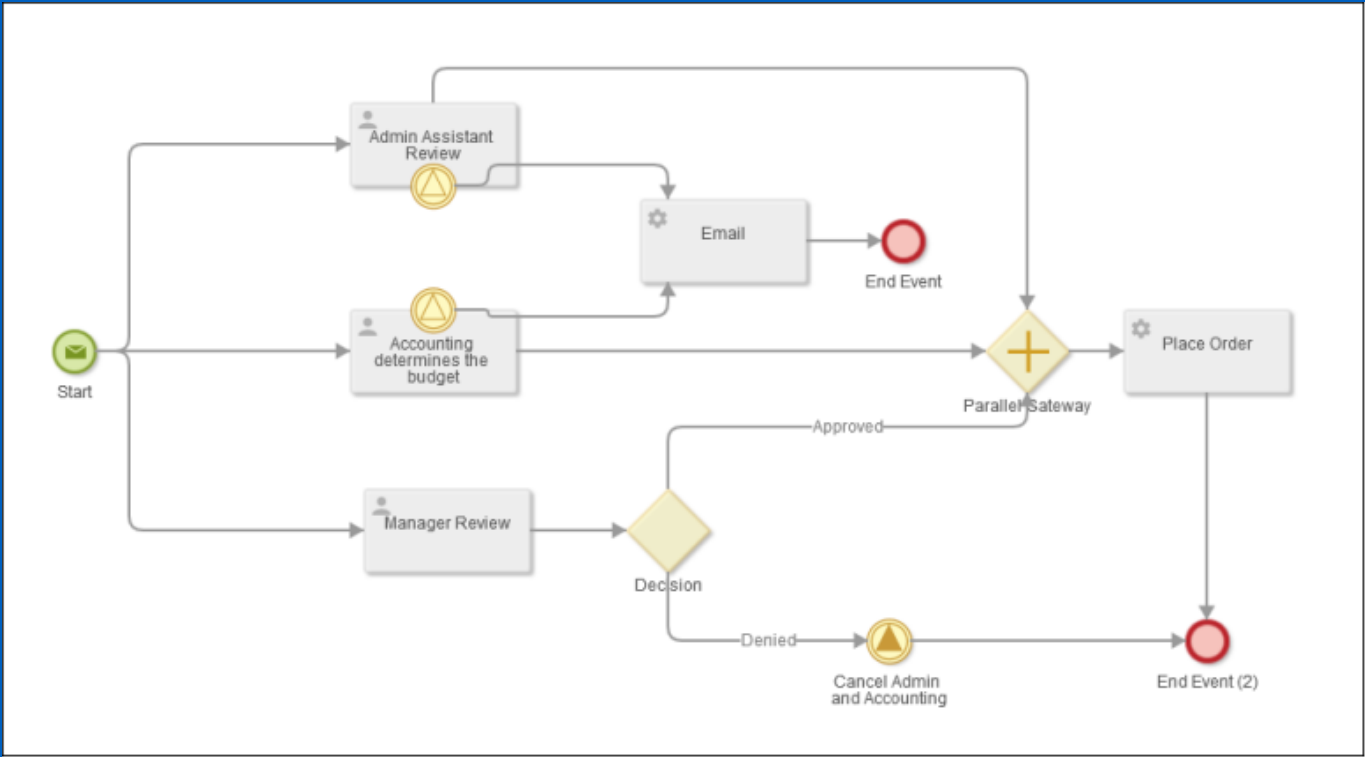
Single Catch Events always listen for a broadcast signal that is set up..

- *Events will only receive broadcast when attached to a user task or sub-process that is active or has not run*

Throw / Catch

Example:

- Multiple levels of parallel approval with multiple active paths
- One out of the three paths has the ability to override and deny the entire process



Documentation View

Laserclic Forms[®]

Inbox

Start Process

Reports

Design

Manage

Monitor

Process Diagram

Get Principal Approval

Transportation Request Submission

Merge Request Submission

More than 1 School?

Transportation Request Principal Approval

Transportation Request Principal 2 Approval

Wait for Both Decisions

Principals Approved or Denied?

Notify Requester of Rejected Request

Merge Deny Paths

Request Updated by Initiator

Resubmit or Cancel?

End Event

The task is reassigned as a reminder to the principal in case no action is taken within 2 days.

There is a hidden fields section on the form that you can use to capture the user information via lookups for task assignment.

By default, the process assumes up to two schools will be participating in a trip. If your organization's process involves more schools, add more task assignments for the respective principals here.

If two schools are participating in a trip the process assume both principals will have the same decision of approve/reject. Update this accordingly based on your organization's approval requirements.

Process Diagram

Get Principal Approval

Transportation Request Principal Approval

More than 1 School?

Wait for Both Decisions

User Task

General

Form

Outflows

Name

Transportation Request Principal Approval

Description

Transportation Request Form is sent to the principal for approval

Assign to

Team

Team based on variable

Users

ADMIN

Save

✓

▶

📊

📄

🔄

Transportation Request

Display

Column Order

No Grouping

Show outflows

Print

Contents

I. Main Process

- 1. Transportation Request Submission
- 2. Merge Request Submission
- 3. More than 1 School?
- 4. Resubmit or Cancel?
- 5. End Event
- 6. Transportation Request Principal Approval
- 7. Transportation Request Principal 2 Approval
- 8. Wait for Both Decisions
- 9. Request Updated by Initiator
- 10. Notify Requester of Rejected Request
- 11. Merge Deny Paths
- 12. Principal(s) Approved or Denied?
- 13. Is it out of state?
- 14. Approval by Board
- 15. Board Approval or

Transportation Request

Last updated: 1/14/2019 5:50 PM

I. Main Process

- 1. Transportation Request Submission
 - Outflows
 - Merge Request Submission
- 2. Merge Request Submission
 - Outflows
 - More than 1 School?
- 3. More than 1 School?
 - Outflows
 - Transportation Request Principal Approval
 - Transportation Request Principal 2 Approval
- 4. Resubmit or Cancel?
 - Outflows
 - Merge Request Submission
 - End Event
- 5. End Event
- 6. Transportation Request Principal Approval
 - Transportation Request Form is sent to the principal for approval



Teams

User Task



Assign
To
Team



Round
Robin
Task
Distribution



Assign
To Team
Based on
Variables



Assign
To
Users

User Task

ID: 6

General

Form

Outflows

Assign to

☒ Team

☐ Team based on variable

☐ Users

Forms 

Team Options

Filter

No filter

Assignment Options

☒ Allow the task to be reassigned 

☒ Email users when this task is assigned

☐ Round robin task distribution 

Edit

Due Date

No due date

User Task

ID: 239

General

Form

Outflows

Name

{/dataset/Department_Selection}-Pending Fingerprinting Results

>

Description

Type a description of the business process object.

Assign to

Team

Team based on variable

Users

HR Hiring Team-Auxiliary

Team Options

Filter

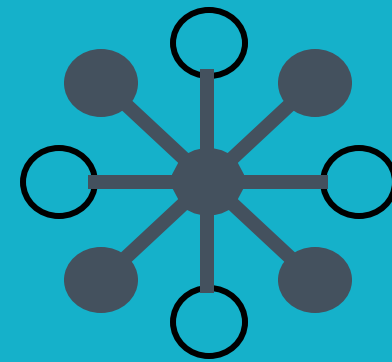
Fingerprint Filter

Edit

\$result=team.findMembersByRole('Fingerprinting-'+
\$util.getValue('Department_Selection'));

Test

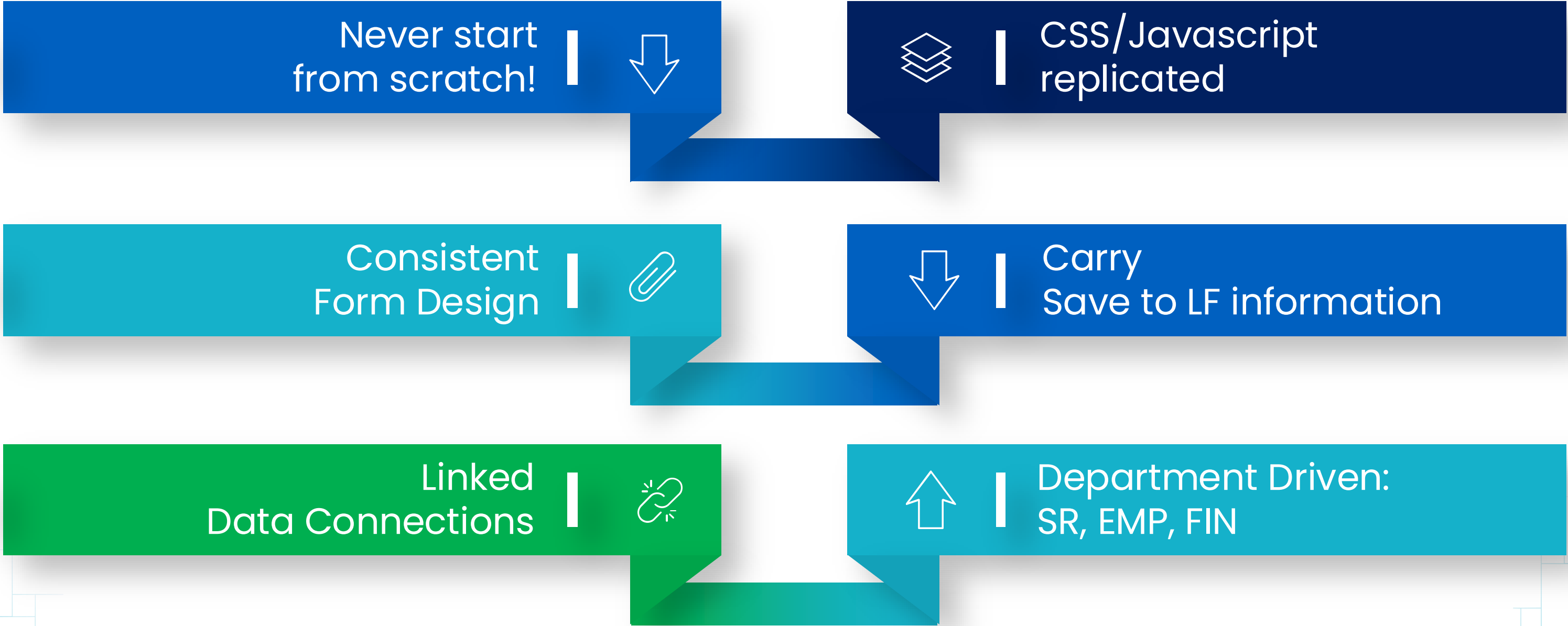
- DPS-FOOD • 2 Users
- DPS-Operations • 1 Users
- DPS-Transportation • 1 Users
- Fingerprinting-AUXILIARY • 0 Users
- Fingerprinting-Food • 2 Users
- Fingerprinting-Operations • 1 Users
- Fingerprinting-Transportation • 1 Users
- Hiring Specialist-AUXILIARY • 1 Users
- Hiring Specialist-FOOD • 2 Users
- Hiring Specialist-Operations • 1 Users
- Hiring Specialist-Transportation • 2 Users



Bonus

Best Practices

Forms Template



Processes



☐	Process ▾	Last modified	Status
☐	★ EMP-HR-Template	Jan 29	
☐	★ EMP-Employment Contrac...	May 7	Published
☐	★ EMP-Contracts Start	8:11 AM	Published
☐	☆ zzEMP-HR-Personnel Infor...	12/19/2018	
☐	☆ zzEMP-HR-Military Leave P...	12/19/2018	
☐	☆ zzEMP-HR-I9 - New	12/19/2018	
☐	☆ zzEMP-HR-I9	12/19/2018	
☐	☆ zzEMP-HR-Employee Abse...	12/19/2018	
☐	☆ zzEMP-HR-Asbestos	12/19/2018	

To Duplicate

Landing Management

The Landing Management section in the Administration page lets you create and manage landing filters. Landing filters let you provide access to some of the published processes on the Start Process page by creating a custom landing page. Select users can access the custom landing page using a configurable link. You can find the Landing Management section in the following part of the Administration page:

SYSTEM SETTINGS

System Security

Data Sources

Team Management

Landing Management

Landing

New landing filter

Name ▲

Type

Billing Worksheets

Internal

Complaint Form

Public

Employee Records Forms

Selected

Referral Forms

Selected

Safety Incident Report

All

Types



Internal

Requires Login
Limited User Access



Public

No Login Required
Must Be Enabled



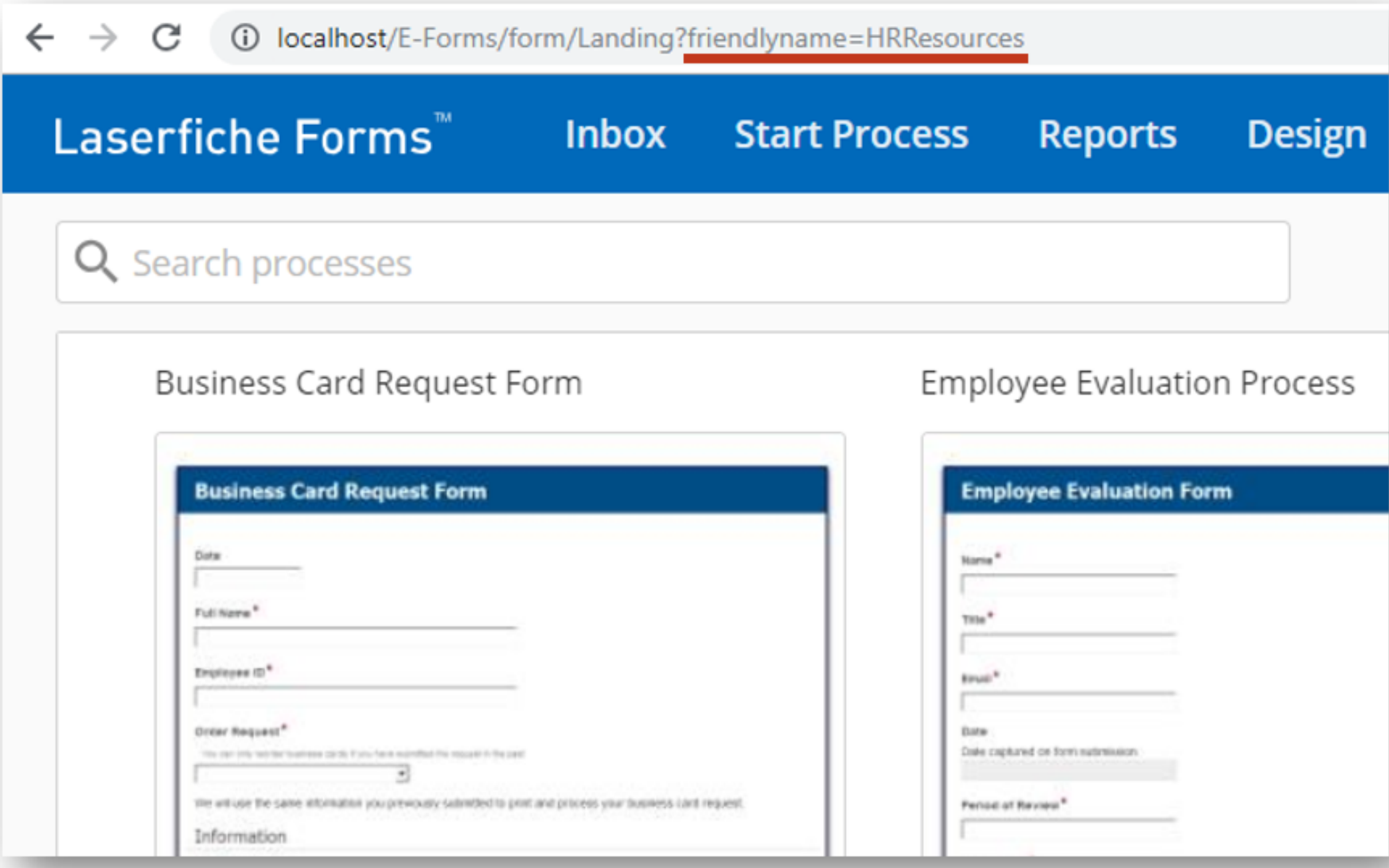
Selected

Requires Login
Choose Specific Processes



All

All Internal and Public
Processes



For Additional Information:

Resources

<https://support.laserfiche.com/>
<https://answers.laserfiche.com/>

Help Files

[Laserfiche Forms Help](#)

support@docunav.com

Questions?

THANK YOU!

DocuNav Solutions

