

LAB: Building A Workflow

Build a workflow to automate Laserfiche processes with
the DocuNav Solutions Engineers

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Connection Information

DocuNav Wifi

Name: DocuNavLab

Password: Lab2024!

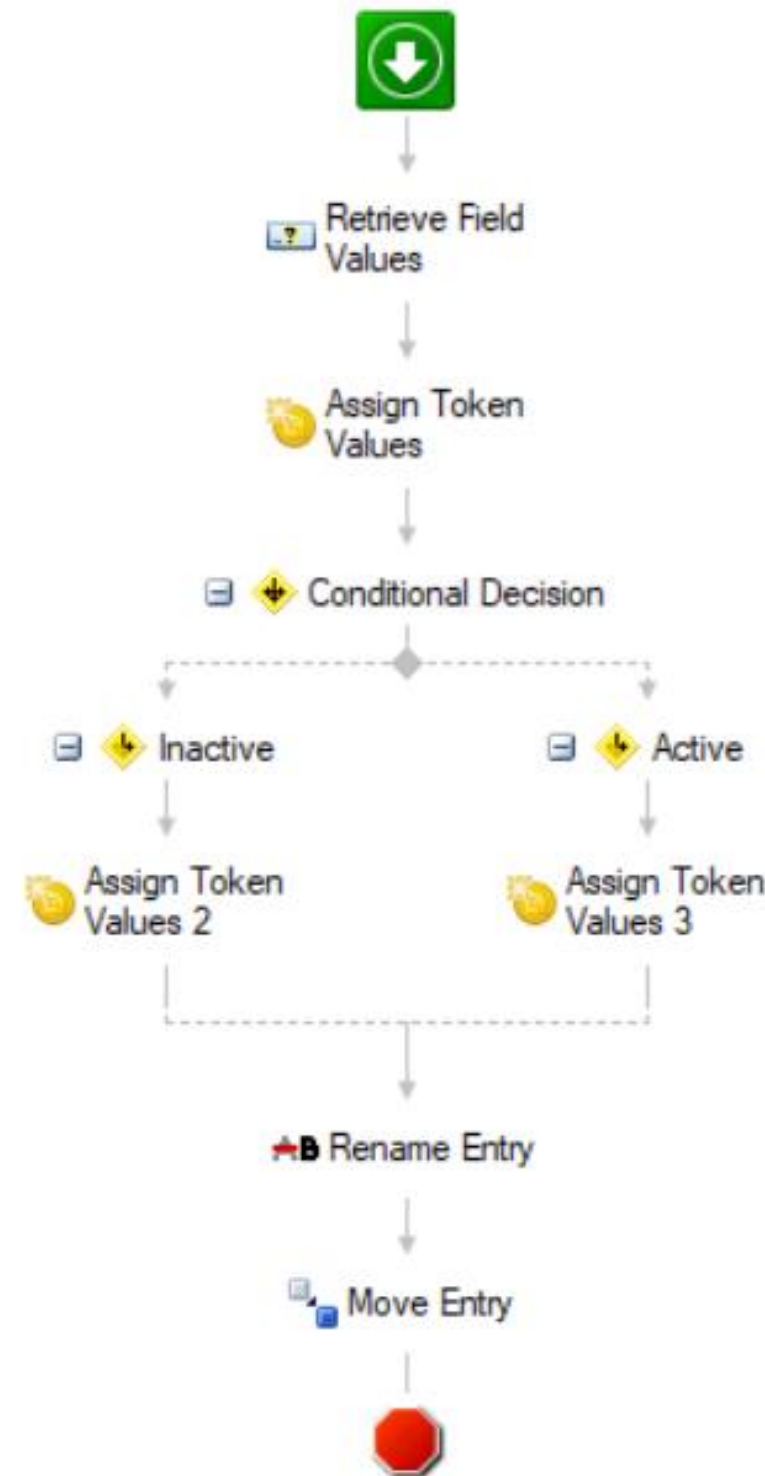
Link to Lab

Go to – [Docunav.com/lab](https://docunav.com/lab)

Click the Lab – Building Workflows

Access token: 27YN

Workflow



What is Workflow?

- Automates Business Processes
- Magic behind the scenes for Laserfiche

Summary

- Takes an Initial document and Re-files it based on a students' enrollment status (Active vs. Inactive).

Any Questions?

01

Create a new workflow

02

Add the new connection profile

Process / Steps

Add a workflow

Use the File select the new workflow option to create a new workflow and rename it to UG 2024 Workflow

Connection profile

A connection profile is the account that allows workflow to interact with the repository and interact with objects in it

03

Add a Retrieve field values Action

04

Add a modify token values action

Process / Steps

Field Values

Use the Retrieve field values activity to capture the Fields from the document that we want to be able to use within the workflow. This will be used to get some of the unique information about the document and make it available for us to use throughout the workflow.
Ex. – Retrieving student information from a starting document

Token Values

The Modify token values action allows us to create and modify tokens which are variables that we can use to hold information that may change during different instances of the workflow.
Ex – Think of Tokens as Variables, they can be updated based on certain conditions

Any Questions?

05

Add a Conditional Decision

06

Add a modify token values action to each branch

Process / Steps

Field Values

Use the Retrieve field values activity to capture the Fields from the document that we want to be able to use within the workflow. This will be used to get some of the unique information about the document and make it available for us to use throughout the workflow.
Ex – Think of a Conditional Decision as an "IF" statement.

Token Values

The Modify token values action allows us to create and modify tokens which are variables that we can use to hold information that may change during different instances of the workflow.
Ex – Tokens can be assigned based on conditional decisions to reflect the different paths

Any Questions?

07

Add a Rename Entry Activity

08

Add a Move Entry Activity

Process / Steps

Rename Entry

Renaming the Entry allows us to change the name of a document in the repository. We can use tokens to create variable names which allows us to add things like a unique ID to each documents name
Ex – Rename a document based on parameters higher in the workflow, can change on a document to document basis

Move Entry

Moving the entry allows us to move a document from one location to another. There are many extremely useful purposes for the move entry activity, you can use tokens in this activity as well and can use these to create new file paths, for example a new folder for each person in the organization.

Ex – Move documents based on parameters higher up

Any Questions?

09

Find test documents in the repository

10

Test the workflow

Process / Steps

Find Tests

Head to the Laserfiche repository and in the Student Records zzWorkQueue you will find 2 documents, Jason’s Transcript and Miles’s Birth Certificate. Take note of their entry ID under as these are the documents we will use to test our workflow

Move Entry

We will use the 2 test documents to try out the workflow we built; by using the entry ID’s we captured during the previous step of the process we can enter it when we begin the workflow to see how it interacts with one of our test documents.

Ways to Start Workflow

Any Questions?

Ready to Try for Yourself?

THANK YOU!

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