



Laserfiche 12

Administration & Components



MEET OUR PRESENTER



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AGENDA

- Components
- Admin Hub
- Installer
- Repository & Metadata
- Forms
- Workflow/Automation
- Web Client
- Security, Compatibility, Support
- Summary of Changes

Laserfiche 12 Architecture

Laserfiche Architecture

- **Core Services**

- Administration Hub
- Repository Server
- Laserfiche Directory Server (LFDS)
- Web Client
- Workflow
- Forms Server
- Audit Trail

- **Supporting Components**

- API
- SDK
- Snapshot/OCR
- SQL Server





Admin Hub



ADMIN HUB



Centralized view for all
Laserfiche applications and
servers



Real-time visualization



Event logs across modules



Application- and server-health

Laserfiche Administration Hub			
Servers		Logs	Support
Server:	v-lf12-preview.laserfiche.com	Source: All Laserfiche applications	Date: Last 24 hours Last 7 days Last 30 days Type: ☐ Information ☐ Warning
Level	Date and Time	Source	Event ID
Error	10/15/2024 11:49:22 AM	Server (Laserfiche-WebClient-Server)	3
Error	10/15/2024 11:49:21 AM	Server (Laserfiche-WebClient-Server)	3
Error	10/15/2024 11:23:15 AM	Laserfiche-Forms-App	60003
Error	10/15/2024 11:23:15 AM	Laserfiche-Forms-App	10502
Error	10/15/2024 11:23:15 AM	Server (Laserfiche-Directory Service-Server)	2
Critical	10/15/2024 9:06:55 AM		
Error	10/15/2024 9:06:55 AM		
Error	10/15/2024 7:24:32 AM		
1 - 100 of 558			

Event Properties

Laserfiche Administration Hub

Servers

Logs

Support

Total 5

Running 2

Unknown 3

Status	Server Host Name
?	LISHUI.laserfiche.com ? Laserfiche Forms ? Laserfiche Workflow
✓	v-lf12-preview.laserfiche.com Edition Windows Server 2022 Standard · Version 21H2 · OS build 20348.1726 ? Import Agent ? Laserfiche Directory Server Laserfiche Forms ✓ Laserfiche Server 12 ✓ Laserfiche Workflow 12 ? Web Client
?	v-sh-lffts-re03.laserfiche.com ? Web Client
✓	v-sh-w10x64-17.laserfiche.com Edition Windows 10 Enterprise · Version 22H2 · OS build 19045.4894 ✓ Laserfiche Forms 12 ✓ Laserfiche Server 12
?	v-sh-w10x64-18.laserfiche.com ? Web Client



BENEFITS

- Improve troubleshooting: Source of errors, not having to switch servers/applications to check errors, real time 'alerts'
- Consolidation of event log across different modules
- Centralized view of servers, statuses, and applications





Installer



Laserfiche Installer

Laserfiche® Installer

	Name	Description	Installed Version	Available Version	Release Notes	☐
	Laserfiche Directory Service	Provides user identity management and application license management for Laserfiche	12.0.2410.65 - Update available	12.0.2503.265	Release notes	☐
	Laserfiche Forms	Author and serve web forms that automate business processes using Laserfiche Forms	11.0.2311.50564 - Update available	12.0.2503.10378	Release notes	☐
	Laserfiche Full Text Search	Full-text search services for repositories that continuously indexes repository content and runs		12.0.2503.155	Release notes	☐
	Laserfiche Repository Desktop Client	Allows users to work with a Laserfiche repository	10.4.2.236 - Update available	12.0.2504.525	Release notes	☐
	Laserfiche Repository Server	Hosts Laserfiche repositories providing secure and reliable document management services		12.0.1.237	Release notes	☐
		An easy-to-use web interface to				☐

Check out the new [Laserfiche Installation Guide](#)

Install



Laserfiche Directory Service 12.0.2503.265

Extracting...

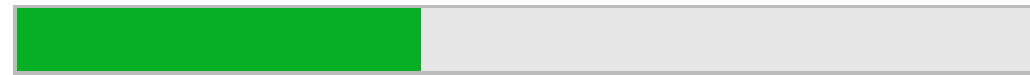


Extracting package



Laserfiche Forms 12.0.2503.10378

Extracting...



Extracting package

Installation Log

[Open Logs folder](#)

Initializing...

Laserfiche Directory Service 12.0.2503.265: Download started

Laserfiche Forms 12.0.2503.10378: Download started

Laserfiche Directory Service 12.0.2503.265: Download succeeded

Laserfiche Directory Service 12.0.2503.265: Verifying and extracting downloaded package

Laserfiche Forms 12.0.2503.10378: Download succeeded

Laserfiche Forms 12.0.2503.10378: Verifying and extracting downloaded package

Cancel installations



BENEFITS

- Simplifies deployment
- Reduce Human Error
- Speeds up upgrades and maintenance
- Improves security and licensing management





REPOSITORY WEB CLIENT/METADATA ENHANCEMENTS



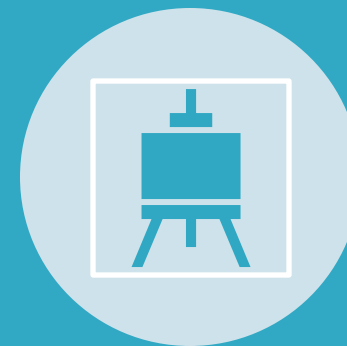
REPOSITORY & METADATA ENHANCEMENTS



DYNAMIC FILTERS



CONDITIONAL FIELD RULES FOR
METADATA TEMPLATES (DATA
ACCURACY)



REDESIGNED METADATA
EXPERIENCE; DRAG-AND-DROP
TEMPLATE DESIGNER



UI UPDATES IN REPOSITORY
DESKTOP CLIENT



MAINTENANCE UPDATES TO
REPOSITORY SERVER & OCR

Laserfiche Repository

Search

Saved Searches

Search Filters

Adam Lee

Release12Preview > City Records > City Resources

19 entries (1 selected)

	Name	Creation date	Last modified
☒	Account Opening Datasheet	9/25/2024 1:47 PM	9/25/2024 1:48 PM
☐	Application Status	7/21/2016 11:09 AM	1/30/2024 4:33 PM
☐	Building Permit Application	1/30/2024 4:32 PM	1/30/2024 4:33 PM
☐	Class Registration Form	9/25/2024 1:47 PM	9/25/2024 1:47 PM
☐	Closing Certain Portions of Buena Vista Blvd	3/22/2016 3:32 PM	1/30/2024 4:33 PM
☐	EPA Municipal Guidelines	9/30/2016 10:56 AM	1/30/2024 4:33 PM
☐	Health Benefits form	9/25/2024 1:46 PM	9/25/2024 1:47 PM
☐	Improvements on Central Avenue	3/22/2016 3:32 PM	1/30/2024 4:34 PM
☐	Laser County Aliso & Wood Canyons Wilderness	9/30/2016 10:56 AM	1/30/2024 4:34 PM
☐	Laser County Caspers Map	9/30/2016 10:56 AM	1/30/2024 4:34 PM
☐	Laser County Caspers WebBrochure	9/30/2016 10:56 AM	1/30/2024 4:34 PM
☐	Memo 6.29.12	3/22/2016 3:32 PM	1/30/2024 4:34 PM
☐	Module Installation	7/21/2016 11:10 AM	1/30/2024 4:34 PM
☐	Park Advisory Board	9/25/2024 1:47 PM	9/25/2024 1:47 PM
☐	Phase I ESA 6.17.10	3/22/2016 3:33 PM	1/30/2024 4:34 PM
☐	Public Transit Presentation	9/30/2016 10:56 AM	1/30/2024 4:34 PM
☐	Residential Construction Regulations	7/21/2016 11:10 AM	1/30/2024 4:35 PM
☐	Senior Citizen Federation & Clubs	9/25/2024 1:47 PM	9/25/2024 1:47 PM
☐	The Path to Collaborative Open Government	1/30/2024 4:35 PM	1/30/2024 4:35 PM

Account Opening Datasheet

Details Fields Preview More

Template

References

Document Type (References)

Template

Author

Adam Lee

Department

Accounting

Hide fields

Add/remove fields

No additional fields assigned

← Back Adam Lee ▾

Toolbox

Create Field Existing Fields

▼ Basic

- Text
- 123 Number
- Date/Time
- Drop-down

▼ Advanced

- Radio button
- Checkbox

▼ Formatting

- Table
- Section
- Aa Static Text

Fields management

Template management

Marketing Projects

Save

Title

Drop-down

← Back Adam Lee ▾

Toolbox

Create Field Existing Fields

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Fields management

Template management

Marketing Projects

Save

Title *

Product Reviewer

Project Information

The current status as of the last time a manager reviewed the project.

Status

Select Media Type

Start Date

End Date

Languages

- English
- Spanish
- Chinese
- Other

Vertical

- Education
- Government
- Finance
- Other

Team

Static Text

Basic Rules !

Field Rules

Rules are evaluated from top to bottom. In case of conflict, later rules override earlier ones.

Rule 2

Show Languages

When any of the following is true

Select Media Type

is

Web Page

Done

Add rule

Laserfiche Repository

Search

Saved Searches Search Filters

Adam Lee

Contracts+ > A > Ace Technologies > CRM System - Statement of Work 1/10/2018 - 1/10/2019 2 entries

Name

Creation date

Last modified

CRM System - Statement o...

01/9/2022 10:07 AM

10/9/2024 10:07 AM

CRM System - Statement o...

9/9/2024 11:17 AM

9/9/2024 11:17 AM

CRM System - Statement of Work 1/20/2022 - 1/25/2024

Details Fields Preview Processes Records More

☐ To Be Renewed

☐ Undergoing Renewal Process

☐ Do Not Renew

☐ Renewed

☐ Other

Contract Status

01 Draft in Progress

Termination Date

//

Click to view contact information

Contacts

Contact Name	Contact Email

+ Add

Save

Cancel

Radio Buttons

Table



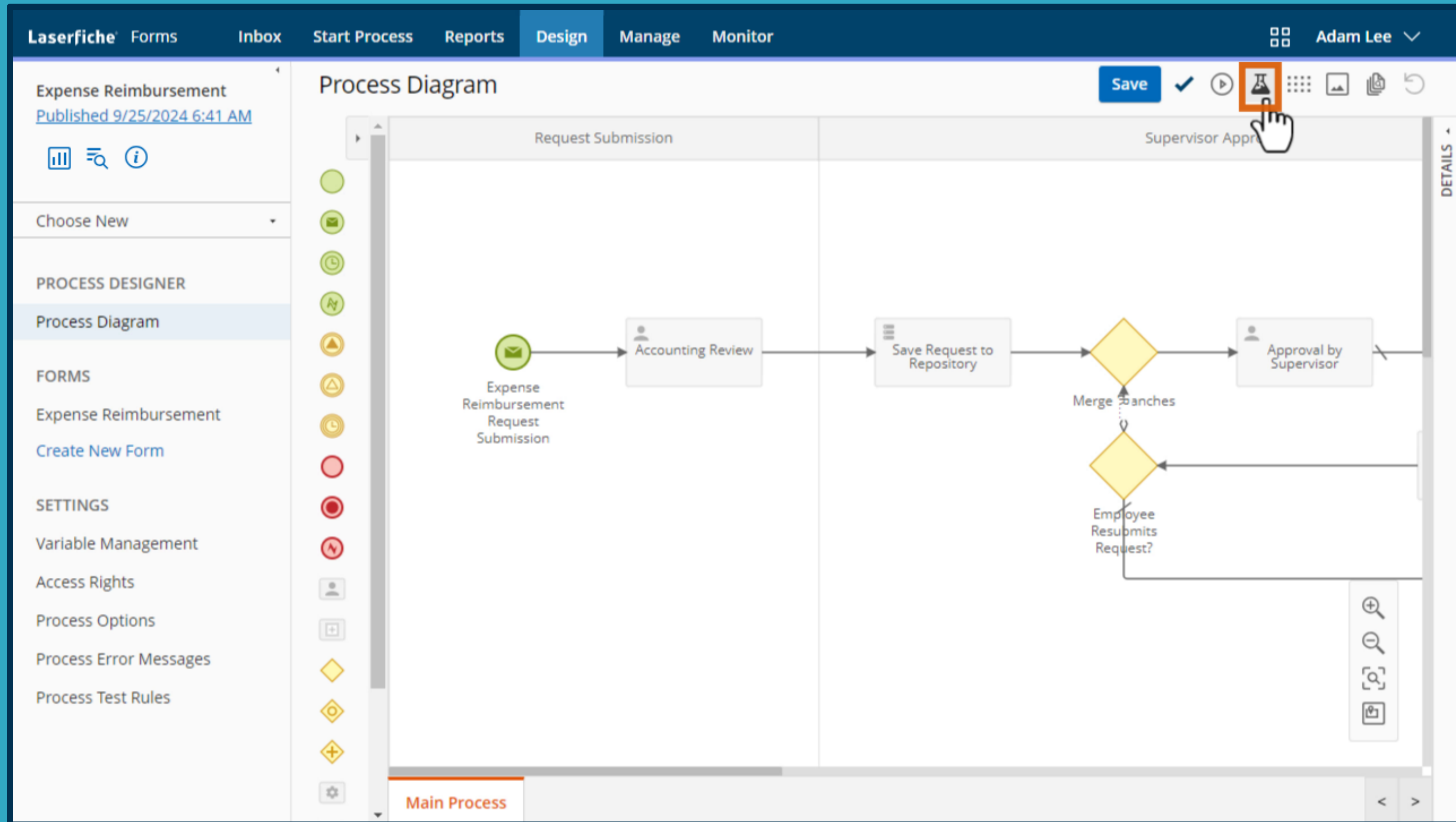
BENEFITS

- Improved Data Entry Accuracy by limiting choices contextually and guiding users with clear labels and instructions
- Simplified Template Management by combining multiple document types into one template using sections and conditional rules rather than managing numerous separate templates.
- Enhanced Reporting and Search by storing structured, searchable metadata tied to documents, facilitating retrieval and workflows



FORMS

Advanced Test Mode Integration



Advanced Test Mode Integration

Laserfiche Forms | Inbox | Start Process | Reports | Design | Manage | Monitor | Adam Lee

Monitoring by Process: All Processes

Instances Tasks Drafts

Instance Status

- ☐ Select all
- ☐ In progress
- ☐ Suspended
- ☐ Terminated
- ☐ Canceled
- ☐ Completed

Start date: Last 30 days

Started by: All

With error log: All

With test data: Yes

Reset Apply

Search instances

Process	Instance	Status	Started by	Last update
CM - New Contract	New Contract - New Contract Test... - Test	In progress	Jim Franklin	9/11/2024
Travel Booking	Travel Booking 1041 - Test	In progress		
Travel Booking	Travel Booking 1040 - Test	In progress		
Travel Booking	Travel Booking 1039: forms - Test	In progress		

1-4 of 4

Laserfiche Forms | Inbox | Start Process | Reports | Design | Manage | Monitor | Adam Lee

Monitoring / Expense Reimbursement 1053 - Test

History Variables

Step	Status	Start date	Finish date	Duration	Action by	Action
Expense Reimbursement R...	Completed	10/2/2024 5:34:14 AM	10/2/2024 5:34:14 AM	Less than a minute	Adam Lee	Su
Timer Catch Event	In progress	10/2/2024 5:34:14 AM				
Accounting Review	Assigned to Test	10/2/2024 5:34:14 AM				

The task was assigned to Test. The process specified assignees are Susan Jones - 10/2/2024 5:34:14 AM

LaserficheFormsInboxStart ProcessReportsDesignManageMonitor

Expense Reimbursement
Published 9/25/2024 6:41 AM

Choose New

PROCESS DESIGNER
Process Diagram

FORMS
Expense Reimbursement
Create New Form

SETTINGS
Variable Management
Access Rights
Process Options
Process Error Messages
Process Test Rules

Process

Reimbursement Request Submission

Main Process

Test Process

Test the process with the following rules? Instances started in test mode will not be included in reports.

- Replace **user task assignment** with **/_initiator** for
 - All user tasks
- Replace **all email addresses** with **/_initiator** for
 - All emails

Save

✓

▶

⚗

⋮

📄

📁

↶

Supervisor App

DETAILS

LaserficheFormsInboxStart ProcessReportsDesignManageMonitor

Expense Reimbursement
Published 9/25/2024 6:41 AM

Choose New

PROCESS DESIGNER
Process Diagram

FORMS
Expense Reimbursement
Create New Form

SETTINGS
Variable Management
Access Rights
Process Options
Process Error Messages
Process Test Rules

Process Test Rules

Create rules to run instances in test mode. Instances started in test mode will not be included in reports.

1

ReplaceUser task assignment

With/_initiator

ForAll user tasks

Enable test rule

2

ReplaceAll email addresses

With/_initiator

ForAll emails

Enable test rule

+ Add rule

Save

LaserficheFormsInboxStart ProcessReportsDesignManageMonitor

SYSTEM SETTINGS
System Security
Data Sources
Repository Profiles
Team Management
Landing Management
Data Maintenance
Volume Management
Holidays

Holidays

New holiday

Name	Observed
Christmas Day	Yes
Independence Day (United States)	No
Labor Day (United States)	No
Memorial Day (United States)	No
New Year's Day	No
New Years	Yes
Thanksgiving (United States)	Yes



BENEFITS

- Improve Control and Safety: Isolate test data & workflow from live production environment
- Faster Process Deployment: Save time with test rules
- Enhanced User Experience: Workflow integration to improve testing
- Improved Workflow Accuracy: Schedule holidays, reduce confusion or miscommunication
- Consistent Business Day Calculations: Ensures deadlines and SLAs based on workdays – compliance & reliability
- Enhanced User Experience: Avoid notifications & reminders

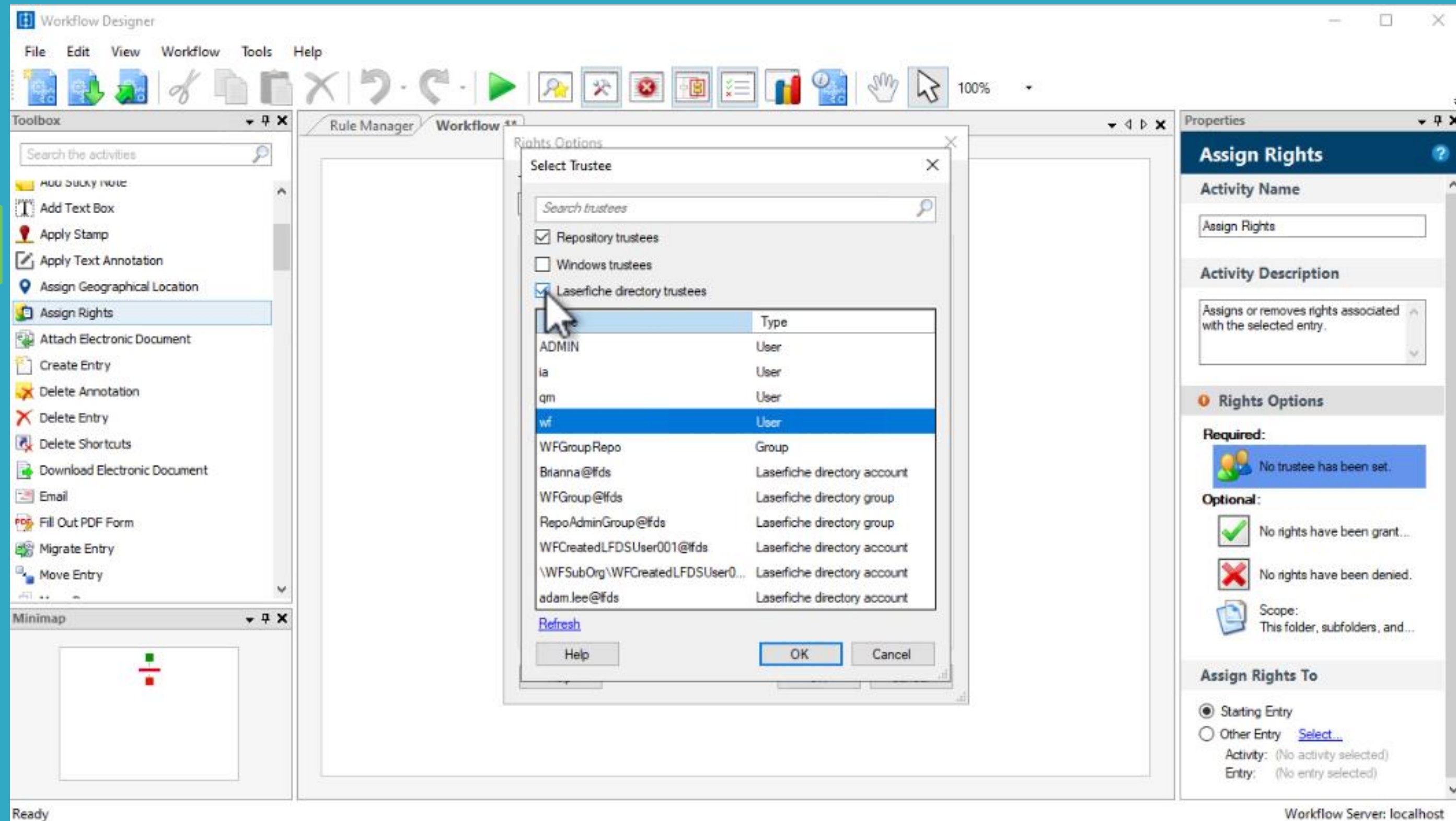




WORKFLOW



Advanced User & Group Management



Advanced User & Group Management

The screenshot displays the Workflow Designer interface. The main workspace shows a workflow diagram with a green start node, an 'Assign Rights' activity, and a red end node. The 'Assign Rights' activity is highlighted with a yellow border. The left sidebar contains a 'Toolbox' with various activities, including 'Integration with SharePoint® Sites' and 'Laserfiche Directory Server'. The 'Laserfiche Directory Server' section is expanded, showing activities like 'Assign Trustee to Groups in Laserfiche Directory Server', 'Assign User License in Laserfiche Directory', 'Create Laserfiche Directory Group', 'Create Laserfiche Directory User', and 'Delete Laserfiche Directory Trustee'. The right sidebar shows the 'Properties' panel for the 'Assign Rights' activity, with fields for 'Activity Name', 'Activity Description', 'Rights Options', and 'Assign Rights To'. The 'Assign Rights To' section has radio buttons for 'Starting Entry' and 'Other Entry', with 'Starting Entry' selected. The 'Workflow Server' is set to 'localhost'.

Workflow Designer

File Edit View Workflow Tools Help

Toolbox

Search the activities

Integration with SharePoint® Sites

- Create List Item
- Delete List Item

Laserfiche Directory Server

- Assign Trustee to Groups in Laserfiche Directory Server
- Assign User License in Laserfiche Directory
- Create Laserfiche Directory Group
- Create Laserfiche Directory User
- Delete Laserfiche Directory Trustee

Minimap

Ready

Rule Manager Workflow 1*

Assign Rights

Properties

Assign Rights

Activity Name

Assign Rights

Activity Description

Assigns or removes rights associated with the selected entry.

Rights Options

Required:

Trustee: wf

Optional:

☒ Rights Granted: Bns Rea

☒ No rights have been denied.

Scope: This folder, subfolders, and...

Assign Rights To

☒ Starting Entry

☐ Other Entry [Select...](#)

Activity: (No activity selected)

Entry: (No entry selected)

Workflow Server: localhost



Test Mode & Safe Automation Deployment

- The new **BPInstanceInTestMode** token lets workflows recognize and execute differently in test environments.
- Forms and workflows can exchange “test instance” parameters for simulation without affecting live data.
- Workflows launched during testing are tagged for visibility in Activity Monitor logs.





BENEFITS

- Takes the risk out of deploying new processes
- Enables rapid iteration and safer debugging environments
- Prevents downtime in production workflows.





AUDIT TRAIL

Now captures justifications for sensitive user actions
(like deletions or exports) and indexes logs for rapid
compliance reporting



IMPROVED IDENTITY & ACCESS MANAGEMENT

Directory Server 12 integrates deeply with Microsoft Entra ID (formerly Azure AD) via Graph API, supporting multi-group synchronization and OAuth 2.0 authentication across Gmail, Outlook, and web service requests



Summary of Changes

- Administration Hub: Centralized system view and logs
- Metadata: Conditional metadata rules, drag-and-drop metadata designer
- Forms: Test Modes, Improved labeling and troubleshooting
- Centralized Installer: Parallel updates
- UI updates across Workflow, Desktop Client, Web Client
- More centralized troubleshooting vs dispersed logs
- Enhanced OAuth support in Workflow activities
- Visual Refresh

QUESTIONS?

MEET OUR PRESENTER



Lorem ipsum dolor sit amet,
consectetur adipiscing elit,
sed do eiusmod tempor
incididunt ut labore et dolore

























