



Laserfiche 12 Forms



MEET OUR **PRESENTER**



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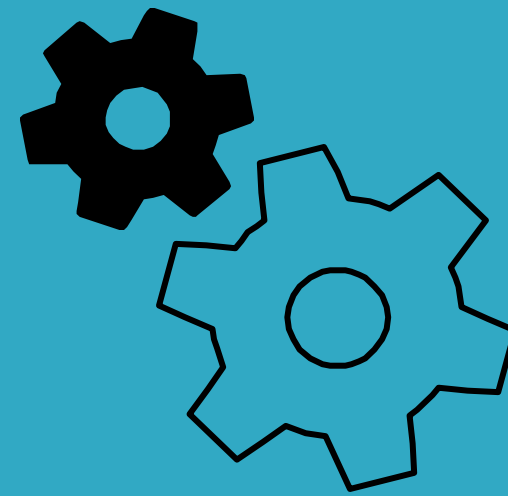
Agenda

Topics Covered:

Design

Configuration

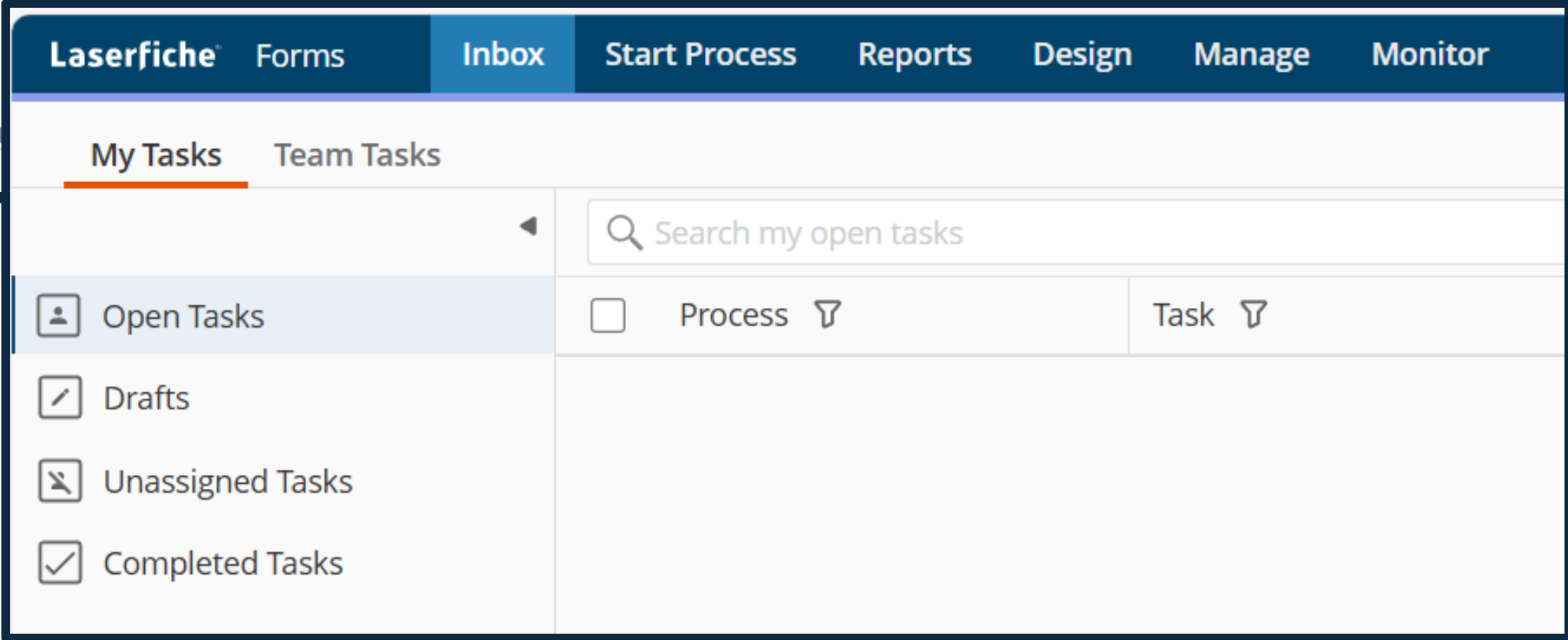
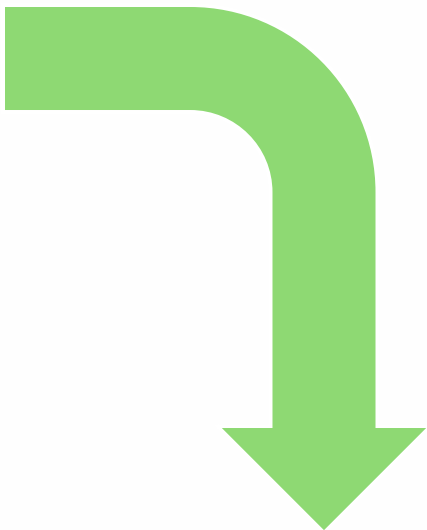
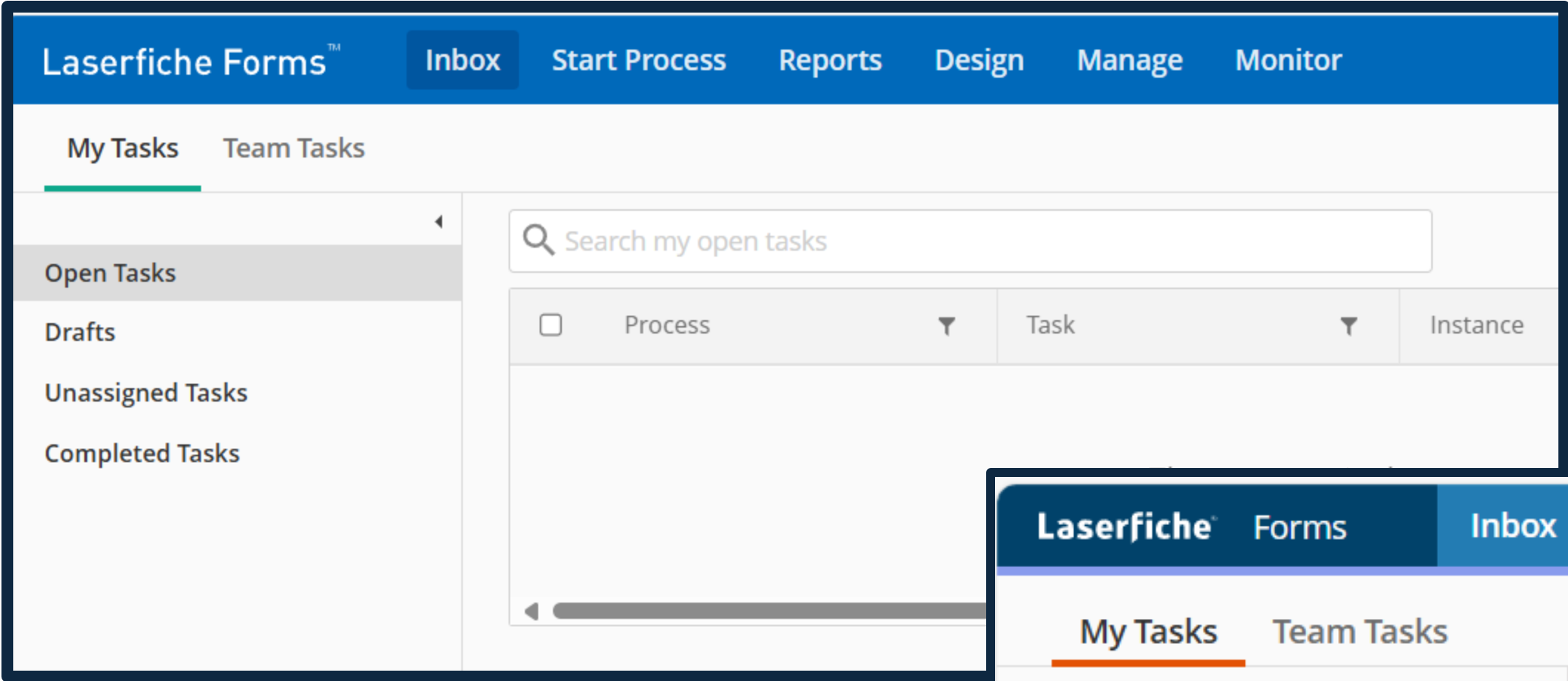
Tips and Tricks



Design



Updated Design



Test Mode

Preview

Test

Debugging

Limitations

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



Replace

All email addresses

With

Save to repository path setting

For

User task assignment

Enable test rule



+ Add rule

Replace

User task assignment

With

Enter a name

For

These individual steps

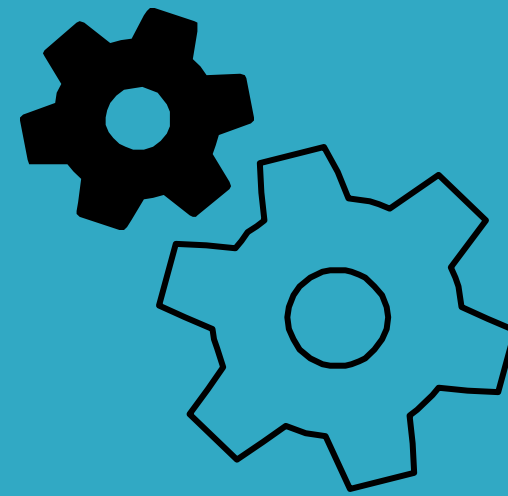
All user tasks

Please

These individual steps

Enable test rule





Configuration



Forms Auditing

- ✓ Improves security and accountability → you know who touched what
- ✓ Helps with troubleshooting → if a process breaks, you can see what was recently changed
- ✓ Supports compliance audits
- ✓ Reduces finger-pointing (“it wasn’t me!” → now it’s in the logs)

Process Design

Configuration
Changes

User Updates

Reporting Date Filter

Also include instances that meet the following criteria

Start date (System Variables)

is in

Today

Add a filter

+ Add another set of

Today

This week

This month

This quarter

Year to date



Also include instances that meet the following criteria

Start date (System Variables)

is in

Today

Add a filter

+ Add another set of

Today

Yesterday

Last (x) days

Week to date

Previous week

Month to date

Previous month

Quarter to date

Year to date

Field Rules

Nested

Show ▼ Campus Name ▼ and Ignore data when hidden ▼ ⊕

When any of the following is true ▼

When all of the following is true ▼

Current User Account ▼	is ▼		>
Current User Name ▼	is ▼		>

⊕ ⊞ ⊗

When all of the following is true ▼

Expectation 1 (Expectation_1) ▼		▼	>	is checked ▼
Expectation 3 ▼		▼	>	is checked ▼

⊕ ⊞ ⊗

⊕ ⊞

Options

Show ▼

Show

Hide

Enable

Disable

Validate

Add CSS Classes

Remove CSS Classes

Signature Options

Signature

Basic Advanced Rules

Text Above Field

Text Below Field

Display Options

☒ Required

☐ Read-only

Signature Size

Large

Button Label

Sign

Sign Options

☐ Use the default signature for the current user (if applicable)

☐ Mark field as read-only when signed in a previous step

Signature Input Method

☒ Allow the user to select signature input method

☐ Allow only typed signature

☐ Allow only drawn signature

Holidays

Laserfiche

Forms

Inbox

Start Process

Reports

Design

Manage

Monitor

LF-Service

SYSTEM SETTINGS

System Security

Data Sources

Repository Profiles

Team Management

Landing Management

Data Maintenance

Volume Management

Holidays

Holidays

Holidays

New holiday

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

The **Holidays** feature makes due dates and escalations “business-calendar aware” instead of just counting raw calendar days.

Access Rights for Data Sources

✓ Protects sensitive databases
(HR, Finance, Student records, etc.)

✓ Reduces accidental or
unauthorized lookups

✓ Supports security/audit
requirements

Data Sources > LF_CustomTables

DBMS type : Microsoft SQL Server

Server : LF-SQL-2

Database: LF_CustomTables

Username: cfisd\Laserfiche

Processes

Offline Lookup Tables

Access Rights

Add users and groups to allow them to utilize the data source when configuring lookup rules for business processes.

Enter a name

Add

Repository Profiles

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SYSTEM SETTINGSSystem SecurityData SourcesRepository ProfilesTeam ManagementLanding ManagementData Maintenance

Repository Profiles

Manage system-level repository profiles that can be used across processes. Process-level repository profile

Name ▾	Laserfiche Server	Repository
Student Records	lf.cfisd.net	Student-Records



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SYSTEM SETTINGSSystem SecurityData SourcesRepository ProfilesTeam ManagementLanding Management

Repository Profiles

Manage system-level repository profiles that can be used across processes.

System Repository ProfilesProcess Repository Profiles

Name	↕	Laserfiche Repository Server	Repository	Username
Student-Records		Disd-lf-9	Student-Records	DISD.dnh\LF-Service

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SYSTEM SETTINGSSystem SecurityData SourcesRepository ProfilesTeam ManagementLanding ManagementData Maintenance

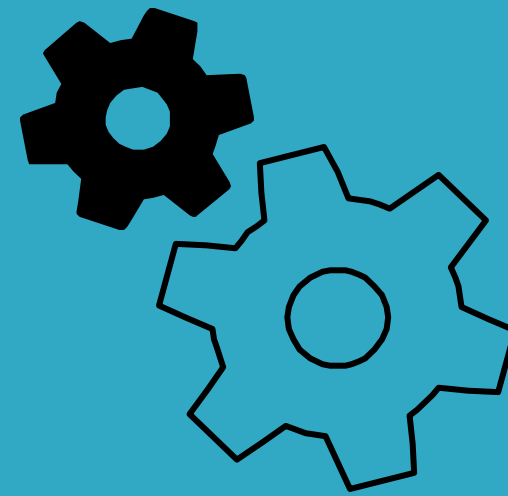
Repository Profiles

View and manage process-level repository profiles, including replacement with the recommended System Profiles. Learn more

System Repository ProfilesProcess Repository Profiles

Search process profiles

☐	Name	↕	Laserfiche Repository Server	Repository	Username
☐	StudentRecords		admlasfichpas01	Student-Records	ead\laserfiche_svc

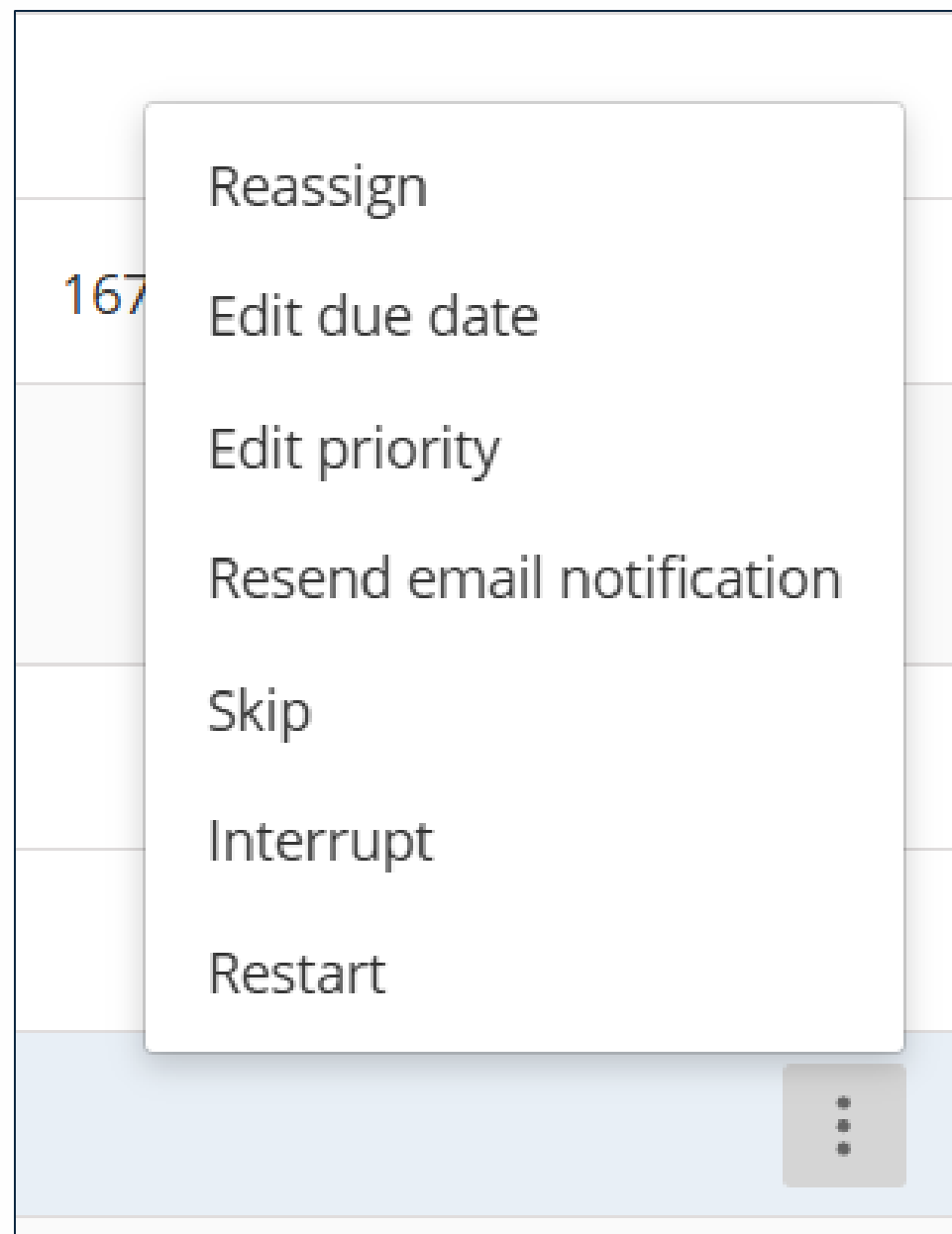


Tips and Tricks

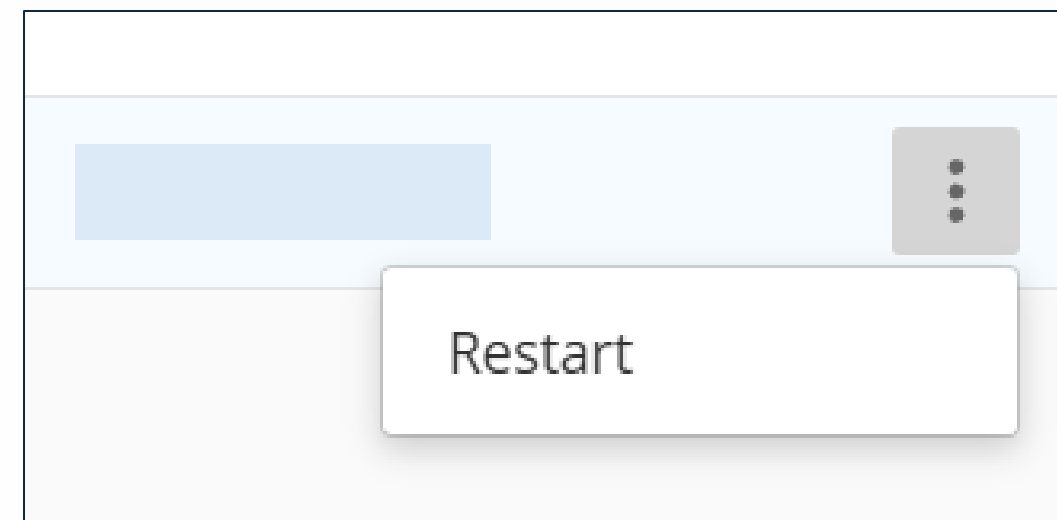


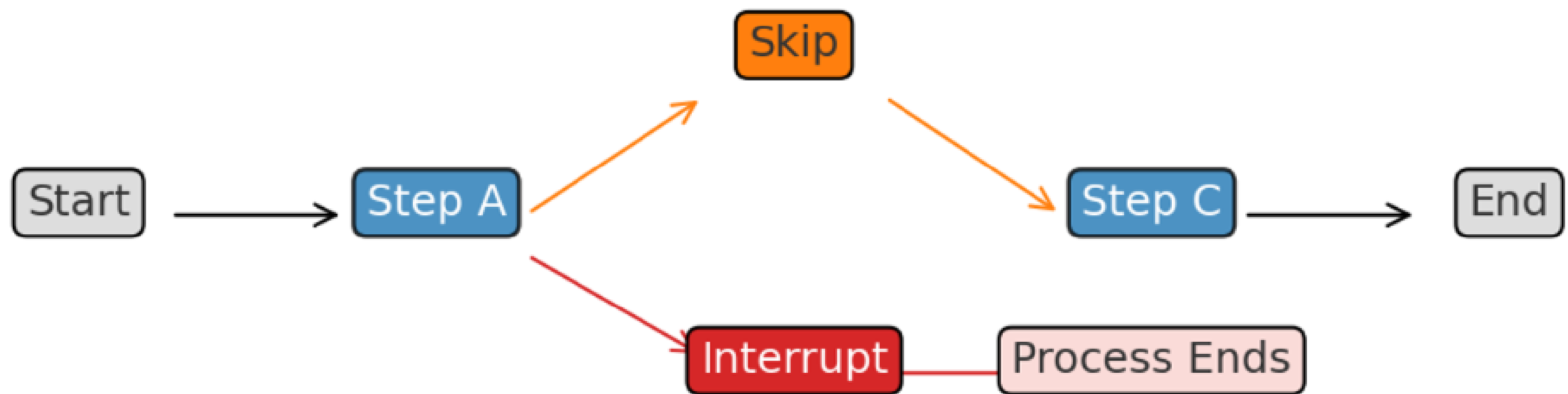
Task Options

In Progress



Completed





Data Maintenance

Laserfiche

Forms

Inbox

Start Process

Reports

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Manage

Monitor

SYSTEM SETTINGS

System Security

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Team Management

Landing Management

Data Maintenance

Volume Management

Holidays

Data Maintenance

The following options allow you to set the number of days you want to retain instance history, file attachments and drafts in the Forms system.

Instances

☐

Remove instance data from completed processes after set number of days:

☐

Remove instance statistics from completed processes after set number of days:

Statistics will only be removed at the same time or after removing instance data. You cannot remove statistics while retaining the data from an instance.

File Uploads

☐

Remove files uploaded from completed processes after set number of days:

☒

Remove unreferenced files after set number of days:

Number of unreferenced files: **51**

Total storage used by unreferenced files: **51.71MB**

Drafts

☐

Remove public drafts saved by anonymous users after set number of days:

☐

Remove private drafts and task drafts saved by authenticated users after set number of days:

Administrative Locks

Prevent users from overriding the global policy at the process and field level.

☐

Lock instance data

☐

Lock instance statistics

☐

Lock file uploads

Reminders

No need to use timer
feature on individual tasks
in the Process Diagram

General Form Outflows **Reminders**

Task Reminder  

Name

Task Reminder

Wait

Variable  0  after  

Day(s) Variable

☐ Exclude weekends and holidays

[Test wait duration](#) 

Options

☒ Repeat reminder

Interval

1  Day(s)

End after

5 Occurrences

☐ Exclude weekends and holidays

[Test repeat timer duration](#) 

Monitor Tasks

Laserfiche Forms Inbox Start Process Reports **Design** Manage Monitor

Mentor Agreement Form
[Published 8/31/2023 9:46 AM](#)

Choose New ▾

PROCESS DESIGNER

Process Diagram

FORMS

Mentor Agreement Form

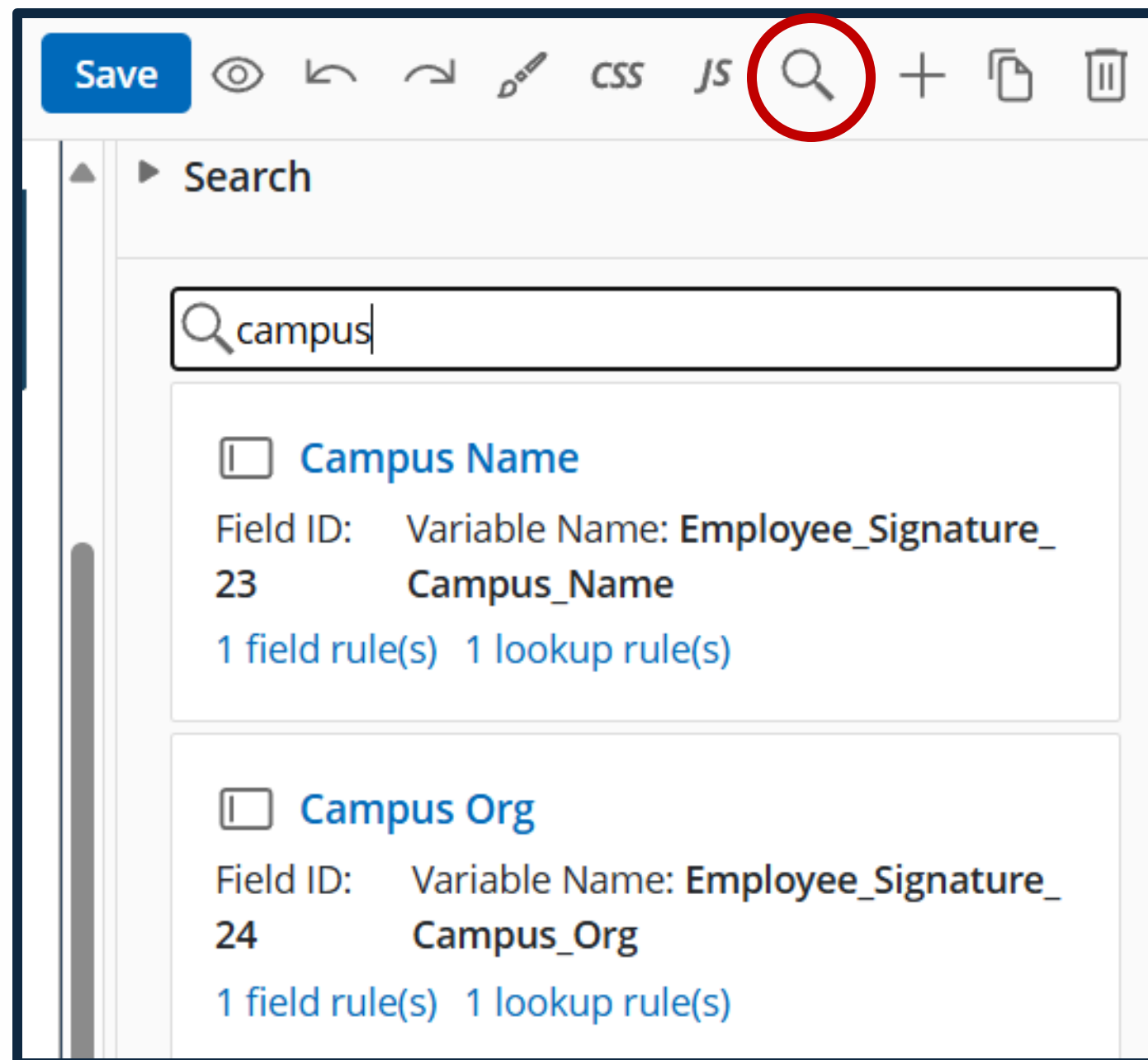
Process Diagram

Submission

Form Submitted

Save to LF

Search Fields

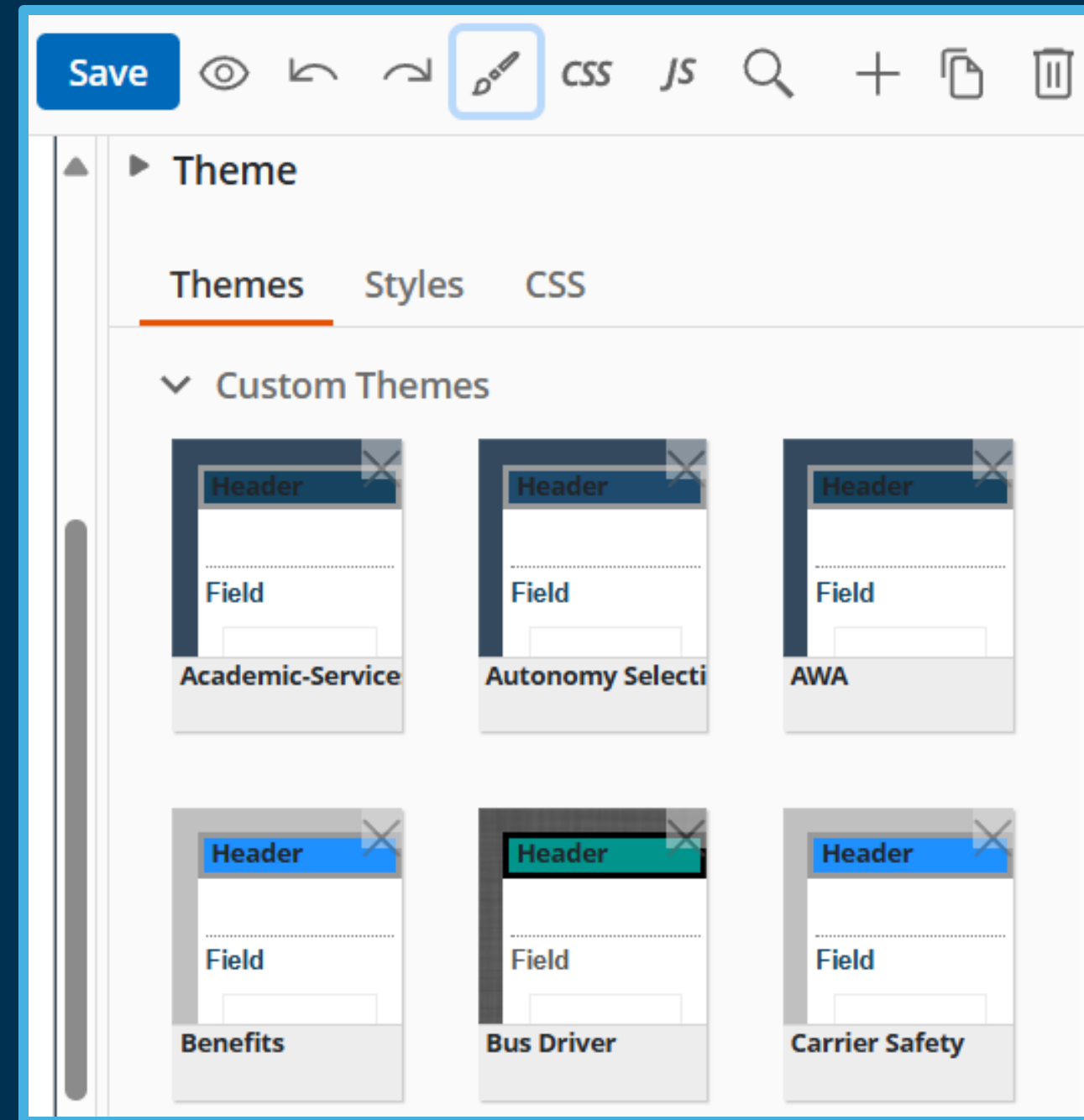


In Forms Designer,
search for fields
instead of scrolling
through your form.

Themes

You can add multiple custom themes to apply across forms processes for each campus/department.

Themes can be easily configured with or without advanced coding.



QUESTIONS?





MEET OUR PRESENTER



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