



Laserfiche 12 Overview

Presenter:

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MEET OUR PRESENTER



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System Admin Hub

**Simplified
Deployment**

**Forms
Test Mode**

12

**Identity
Management**

**Modern
Installer**

Laserfiche 12

**Metadata
Designer**

Laserfiche 12 Overview

- Key features:
 - Significant **metadata enhancements** + **Metadata Designer**
 - **Test mode for forms processes**
 - **Adminhub** for viewing your Laserfiche system at a glance
- Additionally:
 - Focus on usability with a UI refresh, including desktop applications
 - Updates to training materials, ready Day One of launch
- Timeline:
 - Initial release of LF12 on November 6, 2024
 - Major **Spring** and **Fall** updates continue in **2025**
 - All supported products refreshed by end of **2026**

Laserfiche 12 Sneak Peek: Metadata Enhancements

Key Value:

More intuitive display and interactions for metadata, reducing entry errors and user training needs

- Easier interactions and quicker completion with alternative display options such as checkboxes and tables
- Reduce mistakes and improve readability with collapsible sections, show/hide fields based on earlier input, side-by-side fields, and instructional text
- Easier template creation with drag-and-drop designer and template preview

The screenshot displays the Laserfiche 12 interface for a 'Statement of Work 1/01/2024 - 1/01/2025'. The interface is split into two main sections: a left panel for the document content and a right panel for metadata fields.

Left Panel (Document Content):

- ACE TECHNOLOGIES**
- I. Company Contact Information**
 - A. COMPANY NAME**
Ace Technologies
 - B. COMPANY SUMMARY**
Since 1986, Ace Technologies has provided enterprise software solutions. We identify companies' planning needs and create software solutions to address these needs. Through a carefully orchestrated growth strategy, our company has expanded its capabilities to become a national presence in the software solutions industry. Data Design provides solutions tailored for SMBs and large enterprises across the United States and North America.
- II. Project Information**
 - REQUIREMENTS**
In drawing up the scope of work and estimates, the following requirements have been specified:
 - ITEMS**

DESCRIPTION	PRICE
Licenses	\$50,000
Implementation	\$120,000
Total	\$170,000
- ASSUMPTIONS**
In drawing up this implementation plan, the following assumptions have been made about the requirements. The following statements are assumed to be true regarding any documents, content or data provided by the client without any processing or alteration.

- III. Bonding Requirements**

Right Panel (Metadata Fields):

- Statement of Work 1/01/2024 - 1/01/2025**
- Details** | **Fields** | **Processes** | **Records** | **More**
- Template**
Contract - Final
- Company ID**
1481
- Company/Entity**
Ace Technology
- Description**
We are contracting with Ace Technologies to implement a CRM software system.
- IMPORTANT!**
Please do not put confidential information into the description
- Contract Type**
 - ☐ Subscription Agreement
 - ☒ Statement of Work
 - ☐ Legal Correspondence
- Work Items**
 - ☐ Project Hours
 - ☐ Support Hours
 - ☒ Services Hours
 - ☐ Other (If other, specify here)
- Effective Date**
01/01/2024
- Execution Date**
mm/dd/yyyy
- Expiration Date**
01/01/2025
- Click to view contacts**
- Contacts**

Email	Contact Name
legal@AceTech.com	Janice Smith
nm@AceTech.com	Nicole Multon

Laserfiche 12 Sneak Peek: Forms Test Mode

Key Value:

Don't put your production data at risk or spend hours troubleshooting when testing your forms and workflows.

- Easily modify, troubleshoot, and customize live forms with the new Forms test mode, without pressure of submitting test data into a live form
- Test while keeping your critical processes running with no need for troubleshooting or downtime
- New employees can train on internal forms without risk to production data

The screenshot displays the Laserfiche Forms application interface. The main window shows a 'Process Diagram' with tasks 'User Task 1', 'User Task 2', 'User Task 3', and an 'End' node. Two modal dialogs are open:

- Test Process**: A dialog asking 'Test the process with the following rules?' with two rules:
 - Replace **user task assignment** with **Rui Deng** for all user tasks
 - Replace **user task assignment** with **forms** for all user tasksButtons: Start, Cancel.
- Test Process Settings**: A dialog for configuring the test environment.
 - Select Process Profile: Brianna's test profile
 - Substitution rules:
 - ☒ Set all email addresses to:
 - ☒ Current User
 - ☐ Specific email address
 - ☒ Assign all user tasks to:
 - ☐ Current User
 - ☒ Other user: FormsTest
 - ☒ Save documents to alternate folder location: Inhouse/zz_devOnlyButtons: Run Test Mode, Cancel.

Upgrade & Admin Simplification

Key Value:

Reduce upgrade effort and downtime during an upgrade using the centralized installer to view and access all available updates specific to your system

- Identify and download the latest version from the centralized, modern installer
- Enterprise deployment education resources to shorten your upgrade lead time and effort for feature adoption
- New documentation examples and layout to onboard new administrators and explore new features quickly
- License renewal troubleshooting improvements
- Quickly deploy external Forms with new secure configuration tools

The screenshot shows the 'Laserfiche Install' application window. It features a top navigation bar with 'Applications', 'What's New' (with a notification badge), and a search icon. Below the navigation bar are tabs for 'Server Apps', 'Desktop', 'Utilities', and 'Installed Products'. The main content area displays a table of installed applications with columns for application name, current version, install date, and install version. Each row includes a checkbox for updates and a 'Release Notes' link. At the bottom, there is a link to 'Laserfiche Installation Guides' and a large green 'Update' button.

Application	Current Version	Install Date	Install Version	Release Notes	Update
Directory Server License management	11.414.4.432	12/12/2023	Latest (12.0.0.0)	Release Notes	☒
Forms Drag and drop process automation	11.414.4.432	12/12/2023	Latest (12.0.0.0)	Release Notes	☒
Workflow No code process automation	11.414.4.432	12/12/2023	Latest (12.0.0.0)	Release Notes	☒
Laserfiche Document management	11.414.4.432	12/12/2023	Latest (12.0.0.0)	Release Notes	☒
Quick Fields Document capture	-	-	Latest (12.0.0.0)	Release Notes	☒

Be sure to check out the new [Laserfiche Installation Guides](#)

[Update](#)

Admin Simplification & Identity Management

Key Value:

Get a whole-of-system view with the new Administration Hub for quicker troubleshooting and administration, alongside improvements to user identity management and onboarding

- Interactive server list with application status and server information to quickly navigate your Laserfiche system
- Centralized application logs for quicker troubleshooting and Support interactions
- Improved SAML user synchronization with SCIM support for group membership and push-based sync from Directory Server to Forms
- Automate user onboarding with new Workflow activities

Laserfiche				
Overview Servers Logs Support				
Server: laservm.lfdemo.com		Source: All Laserfiche events		
Date: Today Last 7 days Last 30 days		Type: ☒ Information ☒ Warning ☒ Error		Refresh
Event Type	Date and Time	Category	User	Source
Warning	4/19/2024 7:43:45 AM	None	NT AUTHORITY\SYSTEM	Service
Information	4/19/2024 7:43:31 AM	None	NT AUTHORITY\SYSTEM	Service
Information	4/19/2024 7:43:31 AM	None	NT AUTHORITY\SYSTEM	Service
Information	4/19/2024 7:43:31 AM	None	NT AUTHORITY\SYSTEM	Service
Information	4/19/2024 7:43:30 AM	None	NT AUTHORITY\SYSTEM	Service
Error	4/19/2024 7:43:30 AM	None	NT AUTHORITY\SYSTEM	Service
Information	4/19/2024 7:43:27 AM	None	NT AUTHORITY\SYSTEM	Service

Additional Features

USABILITY

ADMINISTRATION

DEPLOYMENT SIMPLIFICATION

- ✓ **Easier Navigation:**
Integrated app-picker,
compact views

- ✓ **Identity Management:**
LFDS user automation
- ✓ **Powerful Process Control:** specify holidays
and flag test data
- ✓ **System Insights:** System
overview and server
usage data

- ✓ **Simpler Deployments:**
Centralized installer and
release feed

Laserfiche 12 Release Timeline



November 2024

- Web client
- Forms
- Workflow
- Laserfiche Server
- Directory Server (LFDS)
- Admin Hub
- Desktop Admin



Fall 2025

Additional features, plus...

- Audit Trail
- DCC
- Connector
- WebLink
- Mobile PWAs



Spring 2025

Additional features, plus...

- Desktop Client
- Snapshot
- Scanning
- API Server



2026

Additional features, plus...

- Import Agent & Email archive
- Quick Fields + Quick Fields Agent
- DocuSign Import Service
- Boomi Connector

Bringing Laserfiche 12 features to Laserfiche Cloud



Laserfiche 12 Webinars

15+ Webinars

Watch LIVE or ON-DEMAND

Watch live or recorded webinars covering topics such as:

- Laserfiche 12 Preview Demo
- Planning Ahead for Your Laserfiche 12 Upgrade
- Metadata Templates
- Process Test Mode
- Usability Enhancements
- and more

[ON-DEMAND] Preview of Laserfiche 12 – Self-Hosted Recorded July 23, 2024 Laserfiche 12 brings a number of key enhancements directly from customer requests, and we're excited to share this preview with you. Watch Now	[ON-DEMAND] Planning Ahead For Your Laserfiche 12 Upgrade Recorded August 14, 2024 Join this webinar in our Laserfiche 12 self-hosted series preview, learn about some key considerations and helpful steps you can take before you upgrade to Laserfiche 12, as well as, key value drivers for your organization that you can share with budget decision makers. Watch Now	[ON-DEMAND] Laserfiche 12 Preview: Process Testing and Troubleshooting Recorded August 27, 2024 Join this free hands-on, instructor-led training and gain essential skills for testing and troubleshooting processes and systems with a preview of new Laserfiche 12 self-hosted features. Watch Now
[ON-DEMAND] Planning Ahead For Your Laserfiche 12 Upgrade Recorded September 17, 2024 Join this webinar in our Laserfiche 12 self-hosted series preview, learn about some key considerations and helpful steps you can take before you upgrade to Laserfiche 12, as well as, key value drivers for your organization that you can share with budget decision makers. Watch Now	[ON-DEMAND] Laserfiche 12 Preview: Designing Metadata Templates Recorded September 18, 2024 Join this free hands-on, instructor-led training and learn to build user-friendly, intuitive templates in the repository with new metadata features in Laserfiche 12. Watch Now	Planning Ahead For Your Laserfiche 12 Upgrade October 15, 2024 10:00 a.m. – 11:00 a.m. PT Join this webinar in our Laserfiche 12 self-hosted series preview, learn about some key considerations and helpful steps you can take before you upgrade to Laserfiche 12, as well as, key value drivers for your organization that you can share with budget decision makers. Register Today
Laserfiche 12 Preview: Process Testing and Troubleshooting October 15, 2024 2:00 p.m. – 3:30 p.m. PT (40 Seat Limit) Join this free hands-on, instructor-led training and gain essential skills for testing and troubleshooting processes and systems with a preview of new Laserfiche 12 self-hosted features. Register Today	Laserfiche 12 Preview: Designing Metadata Templates October 17, 2024 9:00 a.m. – 10:30 a.m. PT (40 Seat Limit) Join this free hands-on, instructor-led training and learn to build user-friendly, intuitive templates in the repository with new metadata features in Laserfiche 12. Register Today	Laserfiche 12 Preview: Designing Metadata Templates October 22, 2024 1:00 p.m. – 2:30 p.m. PT (40 Seat Limit) Join this free hands-on, instructor-led training and learn to build user-friendly, intuitive templates in the repository with new metadata features in Laserfiche 12. Register Today
Laserfiche 12 Preview: Designing Metadata Templates in the Repository October 22, 2024 9:00 a.m. – 10:30 a.m. China Time Zone APAC Regional Session (40 Seat Limit) Join this free hands-on, instructor-led training and learn to build user-friendly, intuitive templates in the repository with new metadata features in Laserfiche 12. Register Today	Laserfiche 12 Usability Enhancements Preview October 22, 2024 10:00 a.m. – 11:00 p.m. PT Join this webinar in our Laserfiche 12 self-hosted series preview. You will see a live preview of these exciting updates, as well as hear about the latest improvements for system administrators, daily users, and process owners. Register Today	Laserfiche 12 Preview: Process Testing and Troubleshooting October 24, 2024 8:30 a.m. – 10:00 a.m. PT (40 Seat Limit) Join this free hands-on, instructor-led training and gain essential skills for testing and troubleshooting processes and systems with a preview of new Laserfiche 12 self-hosted features. Register Today

Laserfiche 12

DEEPER DIVE

A decorative pattern of hexagons in dark blue, light blue, and green outlines is located in the top-left corner of the slide.

METADATA ENHANCEMENTS

Laserfiche 12 Sneak Peek: Metadata Enhancements

Key Value:

More intuitive display and interactions for metadata, reducing entry errors and user training needs

Easier interactions

- Easier interactions and quicker completion with alternative display options such as checkboxes and tables
- Reduce mistakes and improve readability with collapsible sections, show/hide fields based on earlier input, side-by-side fields and instructional text
- Easier template creation with drag-and-drop designer and template preview

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Previous | Next

Sarah M

Statement of Work 1/01/2024 - 1/01/2025

Edit With

1 / 3

Fit width

ACE TECHNOLOGIES

I. Company Contact Information

A. COMPANY NAME
Ace Technologies

B. COMPANY SUMMARY
Since 1986, Ace Technologies has provided enterprise software solutions. We identify companies' planning needs and create software solutions to address these needs. Through a carefully orchestrated growth strategy, our company has expanded its capabilities to become a national presence in the software solutions industry. Data Design provides solutions tailored for SMBs and large enterprises across the United States and North America.

II. Project Information

REQUIREMENTS
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DESCRIPTION	PRICE
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Implementation	\$120,000
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In drawing up this implementation plan, the following assumptions have been made about the requirements. The following statements are assumed to be true regarding any documents, content or data provided by the client without any processing or alteration.

III. Bonding Requirements

Statement of Work 1/01/2024 - 1/01/2025

Details | Fields | Processes | Records | More

Template
Contract - Final

Company ID
1481

Company/Entity
Ace Technology

Description
We are contracting with Ace Technologies to implement a CRM software system.

IMPORTANT!
Please do not put confidential information into the description

Contract Type
☐ Subscription Agreement
☒ Statement of Work
☐ Legal Correspondence

Work Items
☐ Project Hours
☐ Support Hours
☒ Services Hours
☐ Other If other, specify here

Effective Date
01/01/2024

Execution Date
mm/dd/yyyy

Expiration Date
01/01/2025

Click to view contacts

Contacts

Email	Contact Name
legal@AceTech.com	Janice Smith
nm@AceTech.com	Nicole Multon

Transform your metadata

LF11

CRM Subscription 1/1/2019 - 12/31/2020 ☆

Details **Fields** Preview Processes Records More ▾

Template
Contract ▾

Contract ID
354 >

Company/Entity
Ace Technologies >

Contract Type
Subscription Agreement >

Effective Date
1/1/2019 >

Expiration Date
12/31/2020 >

Execution Date
/ / >

Contract Status
02 Pending Review ▾

Description
>

Renewal Status
▾

Termination Date
/ / >

Termination Reason



LF12

CRM Subscription 1/1/2019 - 12/31/2020 ☆

Details **Fields** Preview Processes Records More ▾

Template
Contract Form ▾

Contract ID* 354 > Company/Entity Ace Technologies >

Contract Description
>

Do not include sensitive information in the contract description.

Contract Type*
☒ Subscription Agreement
☐ Statement of Work
☐ Legal Correspondence

Contract Status
02 Pending Review

Effective Date 01/01/2019 > Expiration Date 12/31/2020 > Executed mm/dd/yyyy >

Termination Date mm/dd/yyyy > Termination Reason >

Easier data
entry and
metadata
visualization

Intuitive templates with rich metadata

Data entry made easier

- Bringing the power of Laserfiche Forms to repository metadata
- All existing fields supported
- New powerful display options

The screenshot shows the 'Accounting' configuration page in DocuNav, specifically the 'Fields' tab. The interface is clean and modern, with a white background and blue accents. At the top, there's a breadcrumb 'Accounting' with a star icon. Below it are tabs for 'Details', 'Fields' (which is active), 'Preview', 'Processes', and 'More'. The main content area is titled 'Template' and shows a dropdown menu set to 'Vendor Document'. Below this, there are several input fields: 'First Name' (Nina), 'Last Name' (Arophan), 'Street Address' (143 E. Ocean St.), 'City' (Long Beach), and 'State' (LA). There are also radio buttons for 'Document Type' (Invoices, Purchase Orders, Other) and checkboxes for 'Reps Involved' (Alex, Bob, John). A 'Total Cost' field is set to 800. At the bottom, there's a 'Details' section with a right arrow, a 'Fields' section with an 'Add/remove fields' button, and a message 'No additional fields assigned'. Finally, there are 'Save' and 'Cancel' buttons at the very bottom.

Accounting ☆

Details Fields Preview Processes More ▾

Template

Vendor Document ▾

First Name Last Name

Nina Arophan

Street Address

143 E. Ocean St.

City State

Long Beach LA

Document Type

☒ Invoices ☐ Purchase Orders ☐ Other If other, specify here

Reps Involved

☒ Alex ☐ Bob ☒ John ☐ Other If other, specify here

Total Cost

800

Details >

Fields

Add/remove fields

No additional fields assigned

Save Cancel

Contract - 3

Save



🔍 Search fields

Drop-down

☒ Checkbox

T Static Text

Email

☐ Use dropdown instead

Laserfiche 12 Metadata Enhancements

More intuitive data entry

- Table views for multi-value field groups
- Better list handling
 - Checkboxes
 - Radio buttons
 - Customizable "Other" option
- Only show fields when relevant
- User-friendly field labels for display
- Side-by-side fields with adjustable width
- Collapsible sections
- Instructional text

Compatible with existing metadata

- November release will include:
 - Easily transform existing templates
 - Compatibility view for older clients
 - Full support for existing fields



FORMS TEST MODE

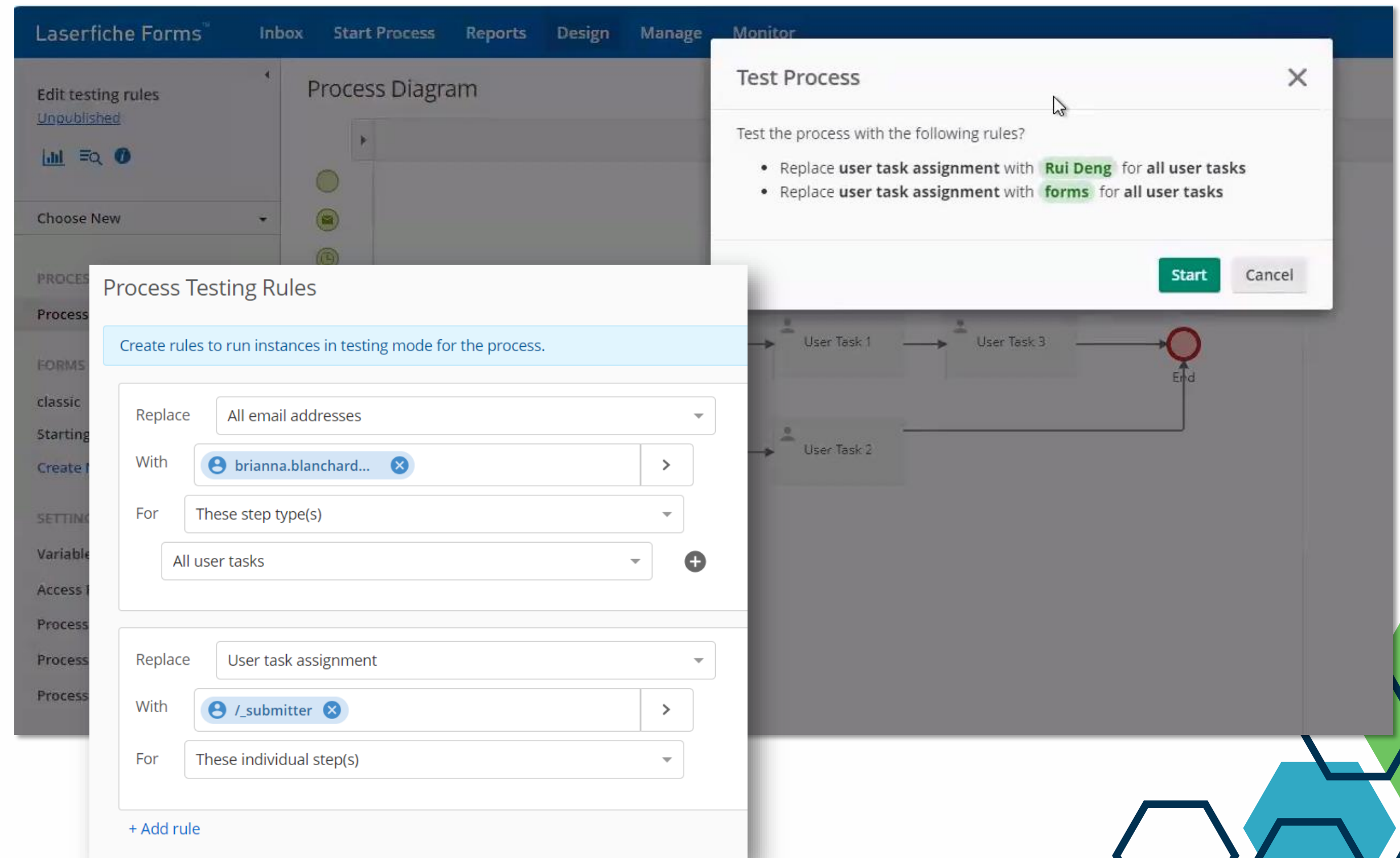


Laserfiche 12 Sneak Peek: Forms Test Mode

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Don't put your production data at risk or spend hours troubleshooting when testing your forms and workflows.

- Easily modify, troubleshoot, and customize live forms with the new Forms test mode, without pressure of submitting test data into a live form
- Test while keeping your critical processes running with no need for troubleshooting or downtime
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QUESTIONS?