COLORADO LASERFICHE USER GROUP

What's New with AI

Laserfiche AI and Hyland Content Innovation Cloud

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DocuNav Solutions

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MEET OUR

PRESENTERS



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Agenda



Laserfiche AI at a glance

The five AI pieces and what each one does



Where each one runs

Cloud, hybrid, or on premises



How AI is priced

Billed by AI credits



Hyland Content Innovation Cloud

A high level look at what is new

TIP: Not every AI feature is available in every deployment. Know where yours lives.



Laserfiche AI

Five pieces, one AI story

Presented by Beau Lollar

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The Five Pieces of Laserfiche AI

Smart Chat & AI Agents

Ask questions about your content in plain language.
Perform automations on otherwise time consuming tasks

Smart Fields

Extract, summarize, or analyze a document and store the result in a field.

Document Summarization

Generate a quick summary of a document.

AI Assisted Form Field

Pull information from attachments to fill form fields.

AI Prompt Rule

Agents that help carry out work.

Where Each One Runs

	Cloud	Hybrid	On premises
Smart Chat & AI Agents	**Yes**	Not yet	Not yet
Smart Fields	**Yes**	**Yes**	Not yet
Document Summarization	**Yes**	Not yet	Not yet
AI Assisted Form Field	**Yes**	Not yet	Not yet
AI Prompt Rule	**Yes**	Not yet	Not yet

Smart Chat: What to Know

To use it in cloud	
	• An active cloud subscription • A Laserfiche Cloud account w/ user permissions to build and/or run

Smart Chat – Ask Mode	Smart Chat – Agent Mode
• Toggle chat window to open in WebClient & AI icon in the header • Question can be asked in plain text • Ask questions about a document or search for documents • Search educational resources (e.g. help files) • Answer questions about Workflows including tokens, activities, start rules, and even lookups	• Same access & plain text request as Ask Mode • Specify entries to act on • Specify what actions you wish to perform on selected entries • e.g. Add/remove tags/templates, moving documents, creating folders/shortcuts, extracting field values, … • Limited to 1000 entries per request

Cloud AI: What to Know

To use it in cloud

- An active cloud subscription
- A Laserfiche Cloud account w/ user permissions to build and/or run

Document Summarization

- Create a summary of a document to prevent users from needing to read it
- Supported for documents, PDF's, Office documents and audio/video files (if transcribed)

AI-Assisted Form Fill

- Configured for a specific Forms' upload field
- Can extract text, date/time, number/currency, checkboxes/radio buttons & even tables

AI Prompt Rule

- Used to send custom request to AI
- Can call Laserfiche AI or other LLM
- Used in Forms for lookups or Workflow via AI activity

Smart Fields in Action

Turn document content into metadata

Prompt in the field

Mark a field as a smart field and describe the result you want.

Manual or automatic

Run it by hand in the web client or let it run when a template is applied.

Security respected

Users only see what their rights allow. Laserfiche does not use customer data for AI training.

Test first

Try your prompts on a handful of representative documents before going wide.

Smart Fields: What to Know

To use it in hybrid

- An active subscription system
- A limited Laserfiche Cloud account
- The Laserfiche AI Service installed locally
- Connections allowed to Laserfiche Cloud

Good to know

- Prompts can be up to 2,000 characters
- Reads the first 10 image pages or first 50 text pages
- Works on text, imaged, and electronic documents
- Audio and video transcripts not supported

AI Inside Workflow

Beyond Smart Fields



Custom AI activity

Write your own prompts to summarize content, improve writing, or generate text inside a workflow.



AI Translation activity

Translate text automatically in multilingual workflows, with context aware results.



Bring your own model

Works with OpenAI compatible models, including local options.

TIP: Beau is working on a one sheet for the Workflow Activity Server.

How AI Is Priced



Billed in AI credits

You buy credits and use them toward AI features, much like tokens.



Think state fair tickets

Credits stand in for dollars, so plan your usage before you scale it.



Larger documents use more

Very long documents can count as more than one extraction.

TIP: We will talk about the model, not specific amounts, today.

Hyland Content Innovation Cloud

A control tower for your content

Presented by Kacey Lambert

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What Is Content Innovation Cloud?

DEMO: Agentic AI with the Hyland Content Innovation Cloud™

A control tower over your systems

AI that sits over Laserfiche, your SIS, ERP, HRIS, and more.

Stay in your system

Connect content where it lives, with no disruptive migration.

Governed and transparent

Keeps security, access controls, and human oversight in place.

TIP: Start where it makes sense, then expand over time.

What Is Inside

Knowledge Discovery

Grounded answers across your content.

Agent Builder

Design and manage AI agents.

Automate

Build and run AI powered automations.

IDP

Capture, classify, and extract from documents.

Cloud Content Repository

Cloud native content storage.

Governance

Retention, disposition, and legal holds.

TIP: Modular. Adopt the pieces that fit your priorities.

Why It Matters Now

Findings from Forrester Consulting, commissioned by Hyland, 2026

45%

of organizations already use AI agents

17%

have scaled agents across the enterprise

39%

have unstructured content prepared for AI

TIP: AI works best when your content is organized and ready for it.

Where It Fits for You



Education

Streamline admissions and financial aid processing with connected student data.



Government

Connect citizen records and case files, and automate routing and approvals.

TIP: Ask us about a demo of Content Innovation Cloud.

QUESTIONS?

Beau Lollar | Kacey Lambert

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