



Document Management

Laserfiche's desktop, web and mobile clients enable users to access and make changes to documents in the repository from any device.



Laserfiche Document Management at a Glance

- Enable accessibility to documents and folders through a Web Content Accessibility Guidelines (WCAG) 2.0 compliant interface
- Instantly generate searchable text on scanned and electronic documents using optical character recognition (OCR) and full-text indexing
- Scroll through every document in the search results and view the context hits directly in the document
- Stream media files without needing to download them first
- Add custom action menu buttons across the entire installation
- Import documents by scanning, dragging and dropping them from a Windows drive, or download them from cloud-based services such as OneDrive and Google Drive
- Create custom import profiles to add a particular template, route new documents to the appropriate folder and name them according to a standardized naming convention

Get Up and Running Immediately

- Access the repository from any computer, tablet or smartphone with a dynamic interface that adapts to any device
- Create reusable document fields that note key document information, like document author and approval time
- Automatically file documents on import
- Build standard document templates that can be applied to different documents or folders
- Connect related documents, like emails and their attachments, using document links
- View and modify a document or folder's templates, fields, tags and links directly from the unified metadata panel
- Easily duplicate existing filing structures
- Navigate and preview content with thumbnails of document pages



Find Documents With One Click

- Open starred, currently in use, checked out and recently viewed documents through the quick access pane
- Run a quick search of all document text, fields, names and annotations either across the entire repository or within a single folder
- Use advanced search options to search by document creation date, the names of users who checked out documents and other metadata
- Find specific words or phrases within document text, metadata, annotations and entry names
- Perform routine searches in one click with custom quick searches that save search preferences

The screenshot displays the Laserfiche HR Manager interface. The top navigation bar includes the 'Laserfiche' logo, a search bar, and tabs for 'Advanced', 'Display Options', and 'HR Manager'. The main content area shows a list of documents under the '2015' folder, with 'Castrapel, Ben' selected. The right-hand pane provides a detailed view of the selected document, including its metadata, life cycle, and cutoff instructions.

Name	Creation date	Last modified	Pages	Te
Abernathy, Gale	2/5/2015 8:45 AM	6/8/2015 6:21 PM		
Baron, Michelle	1/5/2015 9:30 AM	6/8/2015 6:21 PM		
Castrapel, Ben	6/4/2012 7:15 AM	6/8/2015 6:28 PM		
Chen, Laura	2/15/2014 9:00 AM	6/8/2015 6:22 PM		
Cruz, Paulina	8/13/2014 7:00 AM	6/8/2015 6:22 PM		
Franco, Victoria	7/22/2011 9:00 AM	6/8/2015 6:22 PM		
Hernandez, Elias	3/28/2015 9:00 AM	6/8/2015 6:22 PM		
Lee, Bethany	11/18/2009 8:00 AM	6/8/2015 6:22 PM		
Steele, Alexis	5/22/2015 7:30 AM	6/8/2015 6:22 PM		
Xiang, William	5/21/2012 8:30 AM	6/8/2015 6:22 PM		

Castrapel, Ben ☆

Metadata Fields Thumbnails More

Life Cycle Edit properties

- 6/4/2012 Filing date
- 2/23/2015 Employment Ended
- 6/8/2015 Cutoff Eligible for cutoff 1/1/2015
- 1/1/2020 Eligible for destruction

Details

- Location: Current file area
- Status: Cutoff
- Path: Laserfiche\Human Resources\2015\Castrapel, Ben
- Permanent: No

Cutoff Instruction

- Name: End of Employment
- Type: Time-Event
- Cycle: CY (Calendar Yearly)

Star favorite documents and folders to view them in the quick access pane.

Enable Collaboration

- Participate in business processes from anywhere by approving documents and viewing their approval history directly in the details pane
- Hold discussions, ask and answer questions, and create task lists directly on a document or folder
- Work with documents outside of Laserfiche by embedding a document or folder directly in an external application
- Track, display and compare document versions for easy review
- Sign and validate documents with VERS-certified digital signatures

The screenshot displays the Laserfiche software interface. On the left, a sidebar shows a tree view of folders including 'Case Types', 'Candidates', 'Child Care Cases', 'Customers', 'Employees', 'Imports', and 'Requests'. The 'Child Care Cases' folder is selected, showing 30 entries. A table lists these cases with columns for Name, Phase, Status, Urgency, and Assigned To. Case 888 is highlighted. The main panel on the right shows the details for Case 888, including a 'Discussions' tab. The discussion area shows a list of tasks (Child Maltreatment Check, Future Maltreatment?, Immediate Safety issues?, Continuing Services Check, Educate Reporter) and a reply from Deangelo Martin dated Nov 20, 1:38 PM. Below this, another discussion entry from Deangelo Martin dated Nov 20, 1:32 PM is shown, followed by a comment from Jared Rehnitz dated Nov 20, 1:34 PM.

Name	Phase	Status	Urgency	Assigned To
Case 873	Closed	Closed	2	Ashley Davidson
Case 874	Family Progress	Good	4	Deangelo Martin
Case 875	Closed	Closed	1	Jane Starks
Case 876	Family Progress	Good	2	Josh Daniels
Case 877	Family Progress	Good	3	Russell Rueben
Case 878	Family Progress	Good	2	Deangelo Martin
Case 879	Family Progress	Good	3	Ashley Davidson
Case 880	Family Progress	Good	2	Jane Starks
Case 881	Family Progress	Attention	5	Josh Daniels
Case 882	Family Progress	Good	3	Ashley Davidson
Case 883	Case Assessment	Case Planning	2	Deangelo Martin
Case 884	Case Assessment	Case Planning	3	Russell Rueben
Case 885	Case Assessment	Case Planning	5	Jane Starks
Case 886	Case Assessment	Case Planning	2	Ashley Davidson
Case 887	Case Assessment	Case Planning	3	Russell Rueben
Case 888	Case Assessment	Case Planning	3	Josh Daniels
Case 889	Case Assessment	Case Planning	4	Jane Starks
Case 890	Case Assessment	Family Evaluation	2	Deangelo Martin
Case 891	Case Assessment	Initial Assessment		Jane Starks
Case 892	Case Assessment	Family Evaluation	4	Russell Rueben
Case 893	Case Assessment	Family Evaluation	3	Josh Daniels

Hold discussions around documents and folders.

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Run Smarter®

About Laserfiche

Laserfiche Enterprise Content Management transforms how organizations manage information, automate document-driven business processes and make timely, informed decisions. Using Laserfiche, organizations can innovate how documents and unstructured information are processed and analyzed to achieve business results. Laserfiche provides intuitive solutions for capture, electronic forms, workflow, case management, cloud, mobile and government-certified records management. Since 1987, Laserfiche has been the trusted choice of more than 36,000 organizations worldwide.

Laserfiche is a global company headquartered in Long Beach, California, with offices in Guadalajara, Hong Kong, London, Shanghai and Toronto. Through its worldwide network of value-added resellers, Laserfiche has established a strong presence in the Asia Pacific, Europe, Middle East, Africa and Latin America.

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