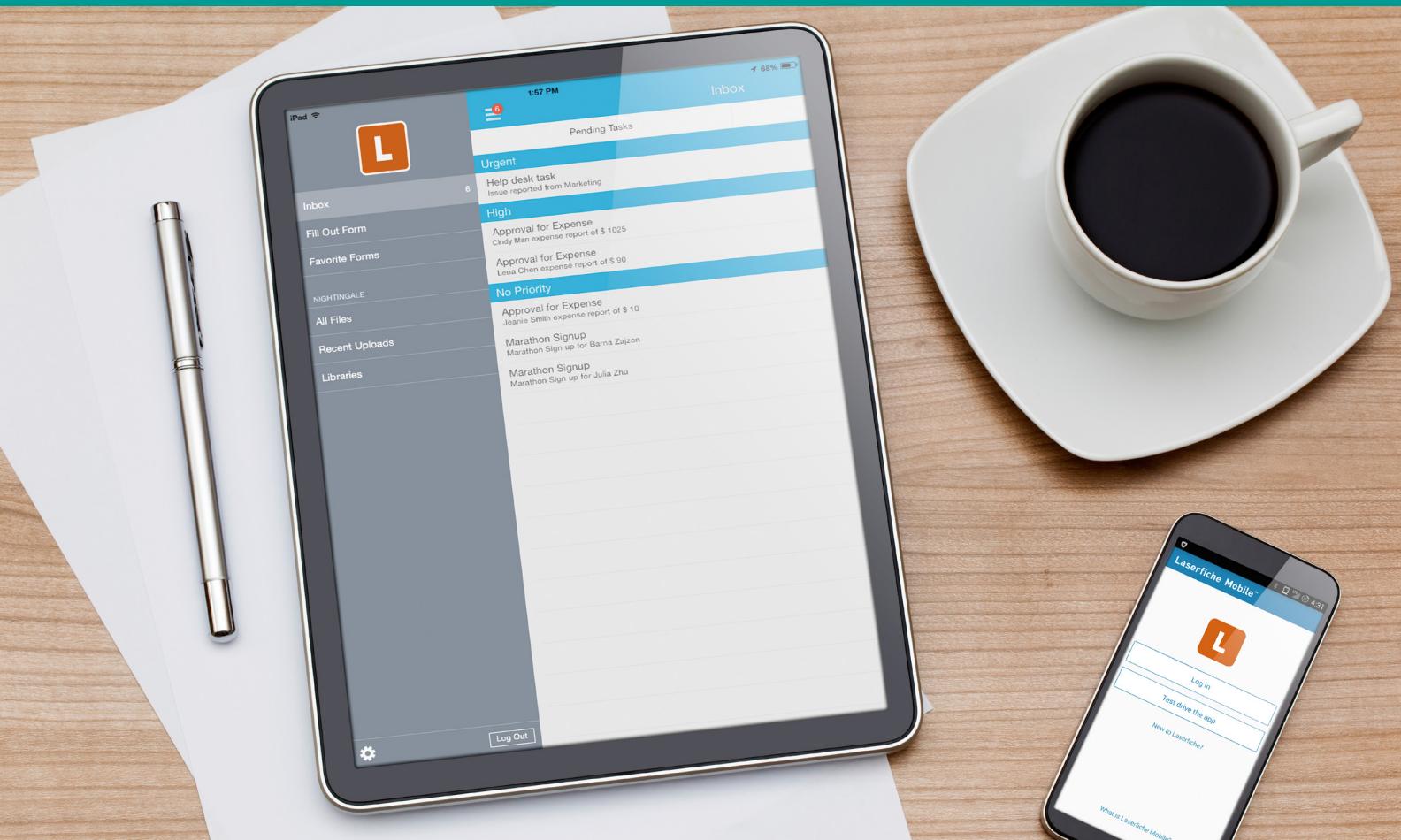


Welcome to Laserfiche

Guide for New Users



Welcome to Laserfiche

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INTRODUCTION

Congratulations and welcome to your new Laserfiche system!

We're excited to welcome you to the Laserfiche community. To ensure that you make the most of your Laserfiche investment, we have provided you with resources to help you get started.

You'll learn where to find Laserfiche best practices, who to talk to when you have an issue and how you can get the training you need to take your system to the next level!

Resources

Creating a Laserfiche Account and Subscribing to Laserfiche Newsletters

Most of the tools we provide can be accessed through the [Laserfiche Support Site](#)¹, where you can download technical guides, white papers, help files, product descriptions, roadmaps and more. To create a Support Site account, you will need your 16-letter Laserfiche serial number, which can be found in your Laserfiche Client.

To find it:

1. Open Laserfiche
2. Go to Help
3. Click "About Laserfiche"
4. Check the lower left side of the page for your serial number



Send us an [email](#)² if you're having trouble locating your serial number, and we'll be happy to assist you.

Once you have your serial number, go to the [Laserfiche Support Site login page](#)³ to create an account.

Also, be sure to subscribe to Laserfiche newsletters by going to the [Laserfiche Subscription Center](#)⁴.

The User News is a vital communication tool that we use to share important information. Each month, it includes tech tips, upcoming webinars, training sessions, information about special promotions and more.

Navigating the Support Site

Site Search

The Support Site search field allows you to look up Knowledge Base articles, white papers, tech tips, guides, manuals and more. You can browse through search results or use the filter pane on the left side to refine your search.

A screenshot of a web browser showing search results for 'workflow' on the Laserfiche Support Site. The URL is https://support.laserfiche.com/search/SearchWF.aspx?q=workflow. The search bar shows 'workflow'. The results are filtered by 'All' and show 1-10 of 6186 results, sorted by relevance. The left sidebar has links for Support Home, Knowledge Base, Downloads, Education, Developer, Training, and Laserfiche. The main content area shows search results for 'Workflow: Email action requiring restarting Workflow Service' (with a detailed description), 'Workflow Designer Error - Laserfiche Answers' (with a detailed description), 'Invoke workflow through scripting - Laserfiche Answers' (with a detailed description), and 'KB Article ID 1013530: Workflow 9 Does Not Automatically Update Field Type Definitions' (with a detailed description). At the bottom, there's a note about 'KB Article ID 1013523: Release Notes for Workflow 9.2'.

Knowledge Base Portal

The Knowledge Base houses hundreds of technical articles and write-ups about Laserfiche products. This extensive in-house library contains information on configuration with step-by-step procedures, hotfixes and potential issues and resolutions.

Laserfiche Software Assurance Plan (LSAP)

Your purchase of a new Laserfiche product automatically comes with the Laserfiche Software Assurance Plan (LSAP), which is a support and maintenance plan that is renewed each year. By keeping your LSAP current, you get access to:

- ▶ Laserfiche technical support through your reseller
- ▶ Software version updates
- ▶ 100% credit toward any new software purchase when you upgrade your current system

You can also subscribe to Premium LSAP, which has all the benefits of LSAP plus:

- ▶ Direct line of communication with Laserfiche support engineers
- ▶ Preferred pricing on regional trainings
- ▶ Preferred pricing on the annual Laserfiche Empower Conference

Your VAR is your first line of support for your Laserfiche needs. Your VAR will escalate issues on your behalf if a Laserfiche engineer is required.

Be sure to fill out your VAR's contact information on page 8 so that you have the information on hand when you need it.

Laserfiche Solution Exchange

The [Solution Exchange](#)⁵ is filled with concrete examples of how other Laserfiche users—new and veteran—from nearly every industry have justified, implemented, configured and optimized their Laserfiche systems.

Search through dozens of step-by-step use cases depicting Laserfiche best practices, including:

- ▶ Organized folder structures
- ▶ Laserfiche Workflow designs
- ▶ Laserfiche Forms templates
- ▶ Integrations with third-party software
- ▶ Much, much more

Whether you're looking for ways to improve search methods or expand your organization's use of Laserfiche, you'll find ideas on the Solution Exchange.

The screenshot shows the Laserfiche Solution Exchange website. At the top, there's a blue header with the "Solution Exchange" logo. Below it, a "Commercial" section features a purple box with the title "STREAMLINE THE HIRING PROCESS" and an icon of a person at a desk. To the right, there's a summary of a case study: "How Steinhafels Inc. Took HR Completely Paperless". Further down, there are sections for "Case Management", "Energy", "Strategy & Compliance", "Best Practices", "Colleges and Universities", and "Colleges and Universities". Each section contains a title, a brief description, and an icon. For example, the "Case Management" section has a box titled "ADMINISTER CASES REMOTELY" with an icon of a smartphone.

You and the Laserfiche Community

Laserfiche works directly with our users through the community channels described below. You can also follow us online:

 Facebook⁶

 LinkedIn⁷

 Twitter⁸

 YouTube⁹

“ The strength of the Laserfiche community lies in the way its members work together to exchange ideas and solve common problems. ”

– Nien-Ling Wacker, Laserfiche Founder

User Groups

User groups are a venue for the Laserfiche user community to come together to explore Laserfiche tips and tricks, best practices and user success stories.

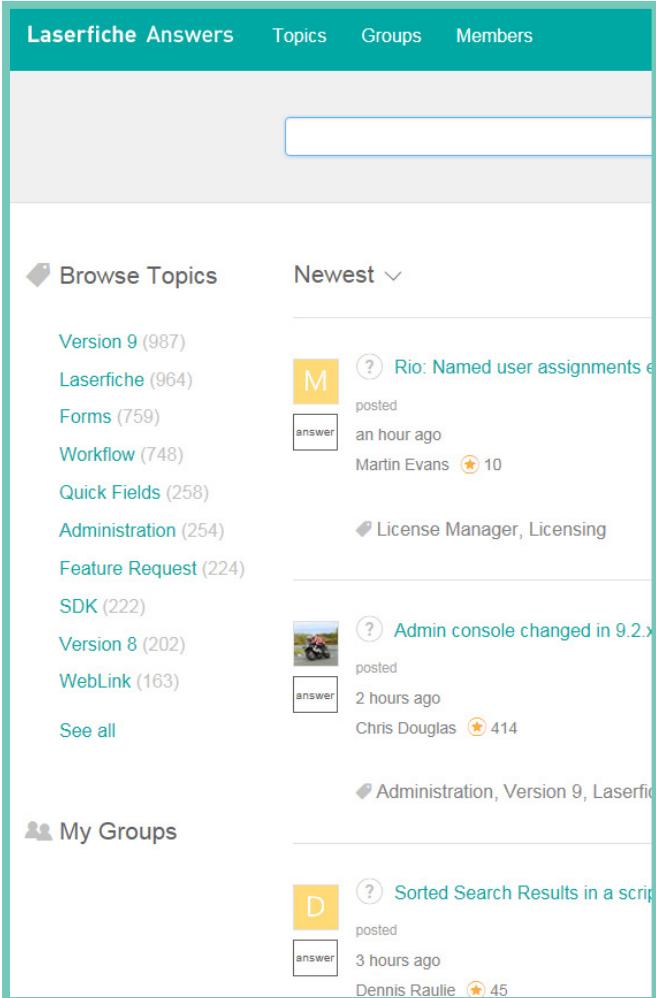
Although user groups are user-led, driven and hosted, Laserfiche does help organize user group workshops and provides free learning materials to attendees.

- ▶ [View the schedule¹⁰](#) for upcoming user groups in your area.
- ▶ [Email¹¹](#) the Laserfiche user group team with inquiries on becoming a user group leader.

Laserfiche Answers

[Laserfiche Answers¹²](#) is an online forum for all things Laserfiche. With nearly 5,000 active members around the world, it is a great resource to crowdsource ideas and solutions. On Laserfiche Answers, you can:

- ▶ Find answers to your questions
- ▶ Browse previous and current discussions
- ▶ Join groups specific to your industry or region
- ▶ Discover innovative ideas on how to better use your Laserfiche system



The screenshot shows the Laserfiche Answers forum interface. At the top, there's a navigation bar with tabs: Laserfiche Answers, Topics, Groups, and Members. Below the navigation, there are two main sections: "Browse Topics" and "My Groups".

Browse Topics: This section is currently set to "Newest". It lists various topics with their counts and descriptions. For example, "Version 9" has 987 posts, "Laserfiche" has 964 posts, and "Forms" has 759 posts. Each topic entry includes a small profile picture, the poster's name, the time since posting, and the poster's reputation score.

My Groups: This section shows a list of groups. The first group listed is "Administration, Version 9, Laserfiche". A post from user "Dennis Raulie" with a reputation of 45 is visible, discussing "Sorted Search Results in a script".

Laserfiche Answers Groups

The Laserfiche community is a diverse association of users from 35,000 organizations across the globe. To facilitate engagement and networking between users with similar needs, we created Laserfiche Groups. Groups allow users to join and associate with a specific group related to their organizations or interests.

Browse through and join existing groups. If you don't find what you need, suggest a new group!

Sample groups include:

- ▶ Empower Conference
- ▶ Laserfiche Lounge
- ▶ Government
- ▶ Financial Services
- ▶ Higher Education

Groups

My Groups

Suggested Groups

All Groups

Filter by group name or group description

Sort by: Size ▾

New Groups



Empower Conference

✓ Joined



Virginia User Group
14 Members



Laserfiche Lounge

✓ Joined



Comunidad Latino Americana
20 Members



Government

✓ Joined

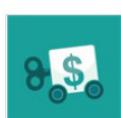


VARs of Laserfiche Private

✓ Joined



K-12 Education
19 Members



Financial Services

✓ Joined



Higher Education

✓ Joined

See more



Certified Professional Program (CPP) Courses

The CPP courses¹³ are comprehensive online training tools designed to reinforce your content management knowledge. They should be your first stop to becoming Laserfiche-proficient. Successful completion will earn you certification in the following topics:

- ▶ Advanced Security
- ▶ Business Process Management
- ▶ Business Process Management II: Laserfiche Forms
- ▶ Capture I
- ▶ Capture II: Quick Fields
- ▶ Capture Workflow
- ▶ ECM 101
- ▶ Laserfiche Administrator I
- ▶ Laserfiche Administrator II
- ▶ Laserfiche Integrator I
- ▶ Laserfiche Specialist
- ▶ Records Management Edition I
- ▶ Repository Architect
- ▶ Troubleshooting

“ Certification was important to show the town that I’m fully committed to the Laserfiche initiative we championed last year. Now I’m better equipped to train users and help them problem-solve. ”

– Wendi Smith, Administrative Assistant, Town of Brownsburg, IN



Laserfiche Empower Conference

More than a typical user conference, the [Laserfiche Empower Conference¹⁴](#) is the largest Laserfiche community gathering of the year. As the premier educational event for Laserfiche customers, partners and IT professionals, it offers hands-on product instruction, presentations by Laserfiche experts and networking opportunities with thousands of other users, VARs and Laserfiche developers.

With more than 150 training courses on topics ranging from metadata to project management, customer stories, workflow design strategies and more, there's something for everyone on your team!



Regional Training

[Regional training¹⁵](#) provides an in-depth, hands-on look at the features and functionality of your Laserfiche system. Both beginning and veteran users can learn new strategies for specific Laserfiche products or best practices for running an enterprise Laserfiche system more efficiently. Regional trainings are prepared, hosted and managed by Laserfiche engineers. With Laserfiche experts on-site, regional trainings are some of the most valuable in-person training events we provide.

Using Laserfiche (for beginners to intermediate users)

Learn to:

- ▶ File documents efficiently and intuitively.
- ▶ Find relevant information quickly.
- ▶ Work with digital documents and participate in business processes.
- ▶ Learn scanning best practices.

Workflow: Beginning to Advanced

Learn to:

- ▶ Automate everyday tasks like approval processes.
- ▶ Analyze a business process to translate it into Laserfiche Workflow.
- ▶ Build an actual workflow that routes documents and creates shortcuts.
- ▶ Begin using advanced workflow functionality including branching logic, reminders and more.

Awards and Recognition



Run Smarter Awards

Every year, the Laserfiche Run Smarter Awards recognize and honor Laserfiche users for their innovative use of Laserfiche.

Recent award categories have included:

- ▶ Best Accounting/Finance Initiative
- ▶ Best Contract Management Initiative
- ▶ Best Human Resources Initiative
- ▶ Best Records Management Initiative
- ▶ Best Change Management Initiative
- ▶ Best Customer Service Initiative
- ▶ Best Shared Services Initiative
- ▶ Most Visionary Laserfiche Initiative
- ▶ Best Use of Laserfiche Forms
- ▶ Best Use of Laserfiche Mobile
- ▶ Most Significant Laserfiche Workflow Initiative

Winning organizations are recognized at the Empower Conference and are awarded one free registration and a free three-night hotel stay during the conference.

To apply for Run Smarter Awards, contact the [Director of Marketing Communications¹⁶](#).

Share Your Success with Us

The Laserfiche community is incredibly collaborative. Share how your great idea or clever use of Laserfiche has made your organization more efficient, and we may feature you in:

- ▶ Case Studies
- ▶ Solution Exchange Articles
- ▶ Public Relations Campaigns
- ▶ Webinars

To participate, contact the [Director of Marketing Communications¹⁶](#).

CONCLUSION

We hope the resources we've provided are helpful as you get started with your implementation. Remember to share this information with your colleagues so they too have the resources they need to operate at peak efficiency. If you have questions about the contents of this onboarding packet, feel free to contact us at info@laserfiche.com.

Your VAR's Contact Information	
Company Name:	<input type="text"/>
Primary Contact:	<input type="text"/>
Phone Number:	<input type="text"/>
Email:	<input type="text"/>

Laserfiche Contact Information	
Corporate Office	(562) 988-1688
Corporate Site	laserfiche.com
Corporate General Email	info@laserfiche.com
Training/Resources	
CPP	cpp@laserfiche.com
User Groups	usergroups@laserfiche.com
Regional Training	events@laserfiche.com
Run Smarter Awards	
Melissa Henley <i>Director of Marketing Communications</i>	melissa.henley@laserfiche.com
Resources	
Laserfiche Answers	answers.laserfiche.com
Laserfiche Support Site	support.laserfiche.com
Laserfiche Empower Conference	laserfiche.com/Conference

ENDNOTES

¹ <https://support.laserfiche.com>

² lsap@laserfiche.com

³ https://support.laserfiche.com/reg/register_form.aspx

⁴ ecm.laserfiche.com/subscription-center/

⁵ www.laserfiche.com/SolutionExchange

⁶ facebook.com/laserfiche

⁷ linkedin.com/company/laserfiche

⁸ twitter.com/laserfiche

⁹ youtube.com/user/laserfiche

¹⁰ ecm.laserfiche.com/user-groups

¹¹ usergroups@laserfiche.com

¹² <https://answers.laserfiche.com>

¹³ www.laserfiche.com/en-us/Events/CPPs

¹⁴ www.laserfiche.com/Conference

¹⁵ www.laserfiche.com/en-us/Events/Training

¹⁶ melissa.henley@laserfiche.com

Laserfiche

3545 Long Beach Blvd.
Long Beach, CA 90807 USA
laserfiche.com

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