

What is Laserfiche Forms and What Can It Do?

Laserfiche FORMS was introduced with Laserfiche version 9. Forms is a web application that allows organizations to replace paper documents with easy to design web forms that can be published on intranets or public websites. These forms can then be collected, processed and routed based on defined business rules throughout the organization.

FORMS Features:

FORM Designer: where you design your form

- 1- Drag and drop form elements onto the form.
- 2- Page rules determine how fields interact on the form.
- 3- Lookup Rules, specify if information should be retrieved from an external database.
- 4- Customize the layout (color, logos, etc.) of the form.
- 5- Custom CSS and Javascript

Process Modeler: build and configure business processes to collect and manage information.

- 1- Add process elements by dragging and dropping onto the canvas.
- 2- Business process elements adhere to industry standards.
 - a. Events: Start Events, start a business process
: End Events, stop a business process after it has finished running.
 - b. Activities: tasks performed by a user or computer
 - c. Gateways: Decision points, where one process flow can split into multiple flows or vice versa.
- 3- Conditional Expressions allow users to define conditions that must be met for a particular path in the process to be taken.

Task Management: Users can view tasks assigned to them.

Submission Tracking: Users who start a process can track that instance.

: Users with appropriate rights can view all instances of a process.

Role – Based Access (Security)

- 1- System-level: allows access to only process creation or to full administrative functionality.
- 2- Process-level: allows access to submit a form or to full administrative functionality of that process.

Integrations

- 1- Laserfiche Workflow: launch existing workflows as part of your business process
- 2- Save to Laserfiche: save submitted forms to your repository
- 3- Webhooks: send Laserfiche FORMS process information to a web server when certain actions take place.

Example:

Travel Requests: Employees can initiate the travel request by logging into the travel request form in their browser and filling out the form.

The screenshot shows a web form titled "Travel Request". It contains several sections: "Personal Information" with fields for First Name (Lacey), Last Name (Fish), Today's Date (10/22/2012), Department (Sales), and Department Manager (Sally Manager); "Reason for travelling" with radio buttons for Workshop (selected), Regional Training, User Group, Tradeshow, Client Site Visit, and Other; "Destination Information" with fields for Depart Date (11/5/2012), Return Date (11/7/2012), and Destination(s) (Pacific Beach, FL); and "Daily Itinerary" with two entries. The first entry is for 11/5/2012 with the agenda "Fly out." The second entry is for 11/6/2012 with the agenda "Attend workshop."

After the employee submits the form, a copy is saved into the Laserfiche Repository and an e-mail is sent to the manager letting them know a travel request is ready to be reviewed in Laserfiche FORMS.

The travel request will be opened by the manager in read-only format. The manager then either approves or denies the request.

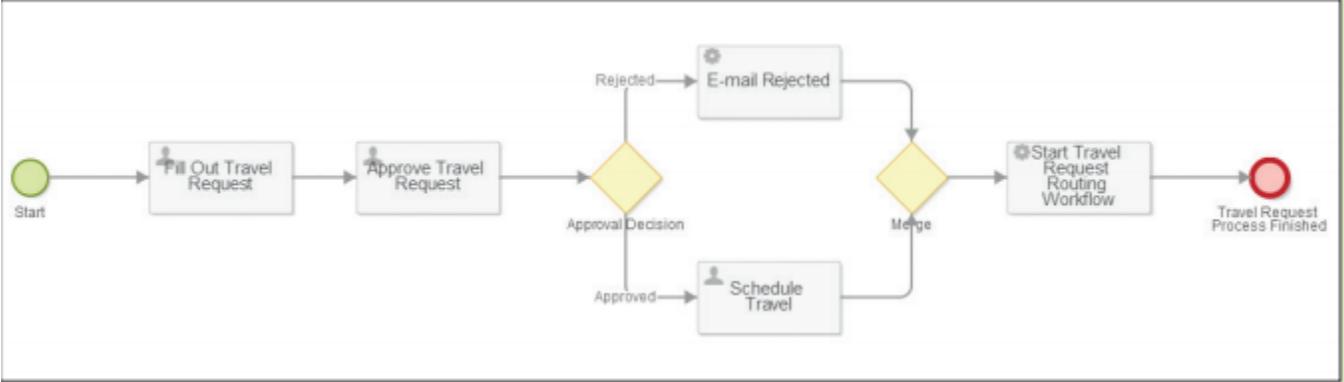
The screenshot shows the read-only view of the travel request form. It displays the "Daily Itinerary" section with three entries:

Date	Nov 5, 2012
Daily Agenda	Fly out.
Date	Nov 6, 2012
Daily Agenda	Attend workshop.
Date	Nov 7, 2012
Daily Agenda	Fly home.

Below the itinerary is a section titled "Approval Actions for Approve Travel Request". It contains a "Comments" field with a text area and two buttons: "Approve" and "Reject".

Depending on if the travel request is approved or denied will determine what happen next. Approved forms will go onto the travel coordinator to be processed further. Denied forms will send an e-mail back to the employee stating they need to contact their manager.

What is happening behind the scenes? Laserfiche FORMS has its own workflow that design the route the forms need to follow.



The process above can be used with Purchase Orders, Invoices, New Employee Applications, anywhere that a paper form is used. Laserfiche FORMS allow organizations to collect accurate and secure data, along with expediting the approval process.