What's New in Laserfiche Rio, Laserfiche Avante, Laserfiche Forms, and Laserfiche Connector 10.3

White Paper

Laserfiche®

Table of Contents

Laserfiche 10.3 includes many new features across the Laserfiche suite that allow you to work with your repository and your information more easily and efficiently. In addition to the products listed below, this release includes Quick Fields 10.3, which provides bug fixes and performance enhancements as well as support for multi-value field groups.

New Features in the Laserfiche Web Client

The Laserfiche web client 10.3 features a variety of new features, including simultaneous co-authoring of Microsoft Office documents, folder browser filtering, a variety of new metadata features, and document viewer updates, among others. In addition, the 10.3 release includes many bug fixes and performance enhancements.

Simultaneous Co-Authoring of Microsoft Office Documents

Laserfiche 10.2 introduced the ability to edit Microsoft Office documents directly in the document viewer, allowing users with Microsoft Office Online Server to edit Word, Excel, and PowerPoint files without launching them in the native application. Laserfiche 10.3 has expanded this functionality to allow simultaneous editing of Microsoft Office documents in the repository. Multiple users can make changes to the document at the same time, and those changes will automatically be integrated and saved.

Simultaneous co-authoring requires the installation of the Laserfiche Document Co-Authoring Host for Microsoft Office. It also requires an Office Online Server. Once you have installed the Document Co-Authoring Host, you can enable co-authoring using the web client configuration page. You can also enable co-authoring in the Laserfiche app by configuring it on the Laserfiche Mobile Server 10.3 configuration page.

Folder Browser Filtering

You can now filter a list of entries in the folder browser, either when viewing folder contents or from search results. This allows you to quickly find relevant documents from a large folder or set of search results. Most columns can be filtered, and the filter options are tailored to the column type. For example, you could filter a folder's contents to display only documents with a particular word or phrase in the name, or only documents created during a certain date range, or with a specific template assigned to them. You can also filter on field values, and apply multiple filters to more precisely pinpoint the documents you need.

Group-Based Settings

Administrators can now create saved searches, quick searches, column profiles, and import profiles and share them with specific groups, or with the Everyone group,

directly from the web client. These settings will be available to all members of the group. These shared settings will not override a user's individual settings; instead, users will see both their own settings and the settings for all the groups that they belong to.

Drag and Drop Between Browser Windows

You can now drag and drop entries in Laserfiche from one browser window to another. This allows you to easily move documents between folders, even if the folders are in different parts of the repository.

Multi-Value Field Group Names

Multi-value field groups, introduced in Laserfiche 10.2, allow administrators to group multi-value fields that are related to each other. In Laserfiche 10.3, you can now give names to your multi-value field groups. For instance, you might want to store contact information for multiple people in a template, with each person having a name, email address, and phone number. You could group all three multi-value fields together so that you can easily see which phone number and email address is associated with each user, and then provide the multi-value field group name "Contacts." Each set of name, phone number, and email address will be collected under the "Contacts" header, and numbered as "1 of 3," "2 of 3," and so on.

Other Metadata Enhancements

Laserfiche 10.3 includes several new features that make working with metadata easier and more powerful.

- **Localized field, template, and tag names.** Administrators can use the new Language tab when viewing template, field, and tag properties to configure translated display names for template names, field names, and tags. When a user views the web client in a particular language, the web client will display the configured display names within the metadata pane instead of the original template name, field name, or tag.

- **Character count for text fields.** As users type values into a text field, they can now see how many characters they have typed, and how many more they can type before reaching the field's maximum width.

- **Custom properties for document relationships.** Users can add custom properties to document relationships. This feature is primarily intended for integrations.

Effective Entry Access Rights Calculation

The Effective Rights tab of the Access Rights dialog box now includes detailed rights inheritance information for specific rights. This allows you to easily troubleshoot security by providing information on why a particular right has been allowed or denied.

Document Viewer and Preview Pane Enhancements

The document viewer and the folder browser preview pane have been updated with several new enhancements to make working with and navigating documents easier.

- **Improved navigation in the document viewer.** Navigation options—for example, next and previous document, and next and previous page—have been placed on the toolbar to make it easier for users to quickly move within and between documents.

- **Document viewer toolbar customization.** In Laserfiche 10.2, document viewer toolbar customization was restricted to annotations. Now, all document actions are available in the toolbar and can be customized.

- **Reorderable metadata tabs.** Users can now customize the order of tabs in the details pane. For instance, by default the processes tab is listed before the records tab, but a records manager could rearrange the tabs to display the records tab first. Their settings will apply to tabs in the details pane of both the document viewer and the folder browser.

- **Email content view.** Laserfiche now provides an easy way to view the text of emails in MSG or EML format, without needing to open the email file in its native application. This view is available in both the preview tab of the details pane, and in the document viewer.

- **Search in the preview pane.** Within-document searches can now be performed in the preview tab of the folder browser's details pane.

Redaction Reasons

The web client management page and Administration Console now allow administrators to define a set of redaction reasons. When applying a redaction, users can choose from the list of predefined reasons. The selected reason will be visible to all users when viewing the document.

Other Enhancements

- **Support for emails in EML format.** Email-specific features, previously only supported for emails in MSG format, are now available for emails in EML format as well.

- **Refresh button on the management page.** A refresh button is now available on the management page, allowing users to quickly see updates.

- **Print original PDF.** When printing a document with a PDF and generated image pages, users can now choose to generate a new PDF from the image pages to print, or print the original PDF.

- **Volume selection in briefcase import.** Users can now choose which volumes to use for briefcase import.

New Features in the Laserfiche App

The Laserfiche 10.3 app release includes the Laserfiche Mobile Server, iOS app, Android app, and Windows app. This release introduces a number of new features including the ability to associate locations with new documents and search for the documents on a map. Additionally, offline documents, folders, and drafts can be automatically synced, documents can be linked together, a new Metadata pane displays entry information in one organized location, other annotations are supported, and more.

Laserfiche 10.3 Mobile Server

Along with general performance improvements, the Laserfiche Mobile Server has several new options on the Laserfiche Mobile Configuration page.

- **Document location:** This option lets administrators add a field for geolocation coordinates, as well as requires users to enter an address or description for a newly snapped or gallery photo uploaded as a new document.
- **Alternate Service:** This option lets administrators set up an alternate service, for example, to facilitate when a Laserfiche Mobile Server and an instance of the Security Token Service is installed in the DMZ with Directory Sever itself residing in the internal network.
- **Services:** A new **Services** tab lets administrators configure the following
  - Simultaneous co-authoring of all Microsoft Office documents in the repository
  - The ability to import documents from OneDrive and Google Drive directly to the app without needing the 3rd party apps on the device
  - Map settings so users can take advantage of searching for documents by location on a map

Laserfiche 10.3 App

Name Changes and Menu Organization

To improve clarity, some items have been rearranged and renamed.

- Under **My Tasks**, **Assigned** has been changed to **Open** and **Available** has been changed to **Unassigned**.
- **My Drafts** has been changed to **Drafts** and moved under **My Tasks**.
- **My Process Status** can now be viewed in the information section of each task.
- **Teams** has been changed to **Team Tasks.**
- **Remove outdated offline forms and tasks** has been changed to **Remove outdated items**.
- **Save offline forms and tasks** has been changed to **Save offline**.

7

Offline Drafts

Users can start a task or form online, save it as a draft, then save the draft offline to continue working while on the go, without internet or cellular service. Offline task drafts can also be renamed to differentiate between drafts and to prevent overwriting information on drafts previously saved offline.

Sync Repository Documents, Folders, and Drafts

A new **Sync** option allows changes to online and offline repository documents and folders, as well as changes to task and form drafts, to be automatically or manually synced.

Search Features

The search pane has been updated to be more intuitive and uniform across multiple platforms. Users can now search on specific field values as well as set up and save search criteria. iOS users can use the new Spotlight search to search for offline documents and forms by document name, task name, form name, and process name.

Metadata, Versions, and Document Links

Similar to the web client, users can now access and work with a document or folder's metadata in a single pane. Additionally, documents can be linked and users can now view, revert, and delete document versions all within the Metadata pane in the app.

Annotations

There have been a variety of updates to annotations in the Laserfiche app. The way in which annotations are applied to documents has been redesigned for a better user experience. In addition to adding sticky notes, stamps, and freehand annotations to documents, you can now also add highlights, redactions, underlines, and strikethrough annotations to documents and text. Redaction reasons are also supported and can be viewed in the Metadata pane.

Maps (Beta)

The new Maps (Beta) feature lets users associate a location with new documents so they can search for the documents based on their location on a map. For example, a police department can see all incident reports uploaded in certain neighborhoods in the city.

Additional Features Added in Laserfiche 10.3

Users can now customize document viewer toolbar buttons, scroll through the folder browser quickly using the new scroll bar, and sort repository entries by name, date modified, date created, or template. Additionally, when using an Android device, users have the choice of saving offline entries and forms to an SD card or their local device. They can also add quick action shortcuts to their devices to perform some repository and forms actions.

New Features in Laserfiche Forms 10.3

Laserfiche Forms 10.3 adds a wide-ranging set of features to the product. The following sections highlight some of the biggest additions.

Inbox

The redesigned inbox layout includes a new summary pane and resizable columns, and allows variables in the task name. The layout contains fewer and more intuitive organizational tabs in the top left. The My Tasks tab contains all the tasks available to you, while the Team Tasks tab contains all the tasks available to a given team.

The Completed Tasks list under My Tasks includes all steps a user completes, including start events and user tasks. Under Team Tasks, team management is now in a separate, new dialog that is available from an option in the top right of the page, instead of coexisting with the team tasks.

Process Designer Updates

- The right pane, where you configure the properties for each object in a process, now opens as a fixed pane. This means you no longer have to click save or cancel to close the pane each time you want to work on another object in the process.
- The pane also features a new **Outflows** tab that lets you drag and drop outflows to configure outflow priority for an Exclusive Gateway activity.
- The Conditional Expression Builder now lets you compare a variable on the left with one on the right, instead of only being able to compare a variable on the left with a static value on the right.
- You can multi-select objects on the canvas by pressing CTRL and selecting the objects. This lets you move and delete multiple objects at once.
- In the bottom right of the canvas, you can see a mini-map. This new feature provides an overview of a process. You can drag the image frame to see parts of the process and zoom in and out of the process.
- Validation errors now highlight the affected objects in the canvas, in the mini-map, and in the right pane. This helps you locate configuration issues more easily.

Designer Toolbar

The toolbar in the top right of the process designer includes the following new options.

- The **Download Process Image** button lets you download the process as an image in one of four formats to help you share the process design with others.

9

- The **Revert** button lets you revert process changes to the last time you saved your process.

Message Start Event

- Forms now supports single-click reCAPTCHA, which lets users verify that they are humans with one click. You can set this up in Forms Configuration. After set up, enable single-click reCAPTCHA in a message start event.
- Users can load and complete a starting form using an HTTP POST request.
- The **Automatically load the next task if the same person is assigned to it** option now includes a sub-option **Only display the form**. This option loads a form more quickly, because only the task is loaded, not the inbox panes and navigation.

User Task

You can use variables in the User Task title.

Adding Objects to the Process Designer

You can take advantage of some new ways to add objects to the Process Designer.

- Drag a sequence flow arrow to a blank spot on the canvas and then select the object you want to add.
- Select a sequence flow that connects two objects and click the plus button to add an object between the two objects.
- Right-click the canvas and select the object you want to add.

Process Options

Process Options now lets you select the variables you want to show in the inbox for the tasks in the process. Previously, you had to view the Variable Settings dialog box for each individual variable.

Form Designer Updates

- In addition to portrait orientation, you can now apply landscape orientation to saved, printed, and downloaded versions of a form. However, the orientation you select does not affect the form's appearance in your browser.
- You can now add helper text above and below Collection and Table fields using the **Text above field** and **Text below field** options.
- You can now display the image that a Forms user uploads in a File Upload field directly on the form.
- The **Do not break page on saved forms** option lets you generate a PDF with one long page containing all the fields in a saved form, while still providing pagination when users complete the form.
- You can now filter for only variables used on a specific form or filter for unused variables in the form designer.

Monitor

Previously, the **Monitor** section could only monitor all processes. The section now lets you filter instances and tasks for specific processes. The Tasks tab also includes additional filters.

Reports

- The Operational Dashboard and Performance Dashboard in the **Reports** section are now combined into an Operational Report. The Operational Report also includes predictions under **Duration** that let you know how likely a task is of being overdue.
- You can now generate custom reports about many processes. When you generate the report, you can select a report type, like a pie chart or funnel chart. The funnel chart lets you compare data between stages in a process.
- After you generate a report, you can save it as a report snapshot. The snapshot captures the data in the report at the time when you took the snapshot. It also captures the report type, filters, and column configuration.
- You can download both reports and snapshots.
- Reports no longer supports the Preview button, which let you preview a chart type before you could use the type in a report. It also no longer supports filtering on instance tables.

Variable Searching

Variable pickers now include a search box.

Authorize.Net Payment Gateway Support

In addition to the integration with Braintree, Laserfiche Forms now provides an integration with Authorize.Net to accept payments when submitting a form. The integration requires an existing merchant account with Authorize.Net. The message start event and user task activities include an option to insert an Authorize.Net payment gateway interface on a form.

Overwriting Processes

You can now make changes to a process on a test server and then overwrite the process in your production environment. When uploading a process XML, Forms will attempt to detect if there is an existing process with the same ID. You will then have the option to overwrite the existing process definition with the uploaded process XML.

Access Rights

You can now grant a user the process-level **Business Manager** role. This user can start a process; view, create, edit, and share reports for the process; take snapshots; edit process instance names; stop process instances; and complete and reassign tasks. Business managers cannot design processes.

New Features in Laserfiche Connector

Laserfiche Connector 10.3 includes new features that let you run workflows, start profiles from the command line, and edit profiles in the Profile Creation wizard. Users can also now review token values while a profile is running.

Workflows and Business Processes

In addition to the wide variety of actions a Laserfiche Connector profile can perform, it can now also start workflows and Workflow business processes. For example, you could configure a profile to search the repository for a document and then run a workflow on it. You can also pass information from applications directly to a workflow.

Command Line Start

You can now start Laserfiche Connector from the command line. The command line option lets applications programmatically start profiles without using a Laserfiche Connector button or keyboard shortcut. You can pass token values and formatting patterns via command line parameters.

Editing Profiles

Previously, Connector profiles could only be updated by opening and editing the XML profile directly. Now you can edit profiles using the same Profile Creation wizard you used to create the profiles. The wizard provides an easy way to make big and little changes as you develop, troubleshoot, and refine your profiles.

Token Review

A new token preview option lets users review, edit, and re-select token values while a profile runs. For example, a profile takes information from a Human Resources application and assigns that information as field values to documents in Laserfiche. By turning on this option, users can review that the correct information was captured from the Human Resources application, change any values as needed, and then click OK to let Connector assign the values to the documents' fields.

Import Options

The import action now has options that allow you to specify what will happen to source files after they've been imported into Laserfiche. Source files can be kept in their original folder, deleted, or moved to another Windows folder.

Updated Interface

Laserfiche Connector's design has been updated and streamlined, making configuring profiles faster and more intuitive.

New Features in the Windows Client

In addition to bug fixes and performance enhancements, the Laserfiche Windows client 10.3 features the following enhancements previously introduced in the web client:

- **Security reports.** Security reports allow administrators to generate reports containing information on entry access rights and trustee rights and privileges, both for ease of troubleshooting and for audit purposes.
- **Open audit reports directly from entries.** Once you have configured audit reports in Audit Trail Reporter, you can launch them for a specific entry directly within the Windows client.

The Windows client also includes the following features; see New Features in the Web Client, above, for more information:

- Named multi-value field groups.

- Localized fields, templates, and tags.

- Custom properties for document relationships.

- Effective entry access rights calculation.

- Redaction reasons.

In addition, the Laserfiche desktop administration console now includes support for the search thesaurus, which allows administrators to define associations between words. When one word is searched, both it and its synonyms will be returned. For instance, you could configure the search thesaurus such that searches for "Mike" return results containing "Michael" and vice versa, or that searches for "FOIA" return results containing "Freedom of Information Act" and vice versa.

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Description:
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