

GETTING STARTED WITH Metadata Enhancements in Laserfiche 12





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Introduction

In Laserfiche, metadata is information about an entry that is stored alongside the document or folder. The most common type of metadata in Laserfiche is repository fields and templates.

Fields are containers for information about documents and folders, and are usually grouped into templates for easier management.

There are three reasons for using fields:

- To provide information that will help users find a document.
- To store supplemental information about the document that can be used in reporting.
- To help the document move through a workflow or business process.

The screenshot displays the Laserfiche Repository interface. The top navigation bar includes the 'Laserfiche Repository' logo, a search bar, and user information 'Adam Lee'. The breadcrumb trail shows the path: 'Contracts+ > A > Ace Technologies > CRM System - Statement of Work 1/10/2018 - 1/10/2019'. Below the breadcrumb, there are two document entries in a table:

Name	Creation date	Last modified
CRM System - Statement o...	01/9/2022 10:07 AM	10/9/2024 10:07 AM
CRM System - Statement o...	9/9/2024 11:17 AM	9/9/2024 11:17 AM

The right-hand pane shows the 'Details' view for a selected document: 'CRM System - Statement of Work 1/20/2022 - 1/25/2024'. The 'Fields' tab is active, displaying a 'Template' dropdown set to 'Contract'. Below this, there are input fields for 'Contract ID' (1481), 'Company/Entity' (Ace Technologies), and 'Requested by'. An 'IMPORTANT!' warning states: 'Do not include sensitive information in the contract description.' The 'Description' field contains the text: 'We are contracting with Ace Technologies to implement a CRM software system.' Other fields include 'Title *' (CRM System Statement of Wo), 'Contract Type' (Statement of Work), 'Effective Date' (1/20/2022), 'Expiration Date' (1/25/2024), and 'Execution Date' (//). A 'Renewal Status' field is also present. At the bottom, there are 'Save' and 'Cancel' buttons.

Repository template for a Statement of Work document.

Benefits of the Laserfiche 12 Metadata Enhancements

Laserfiche 12 includes new powerful display options for metadata, as well as an improved repository template designer. The metadata enhancements in Laserfiche 12 result in many benefits for administrators and users.

More Intuitive Template Design

An intuitive template layout can make it easier for users to fill out fields with appropriate information and view that information at a glance without excessive scrolling. Fields can be grouped into sections or laid out side-by-side. Tables can provide a clear way to view and enter multiple rows of information. For example, in a template associated with client documents, there can be a personal contact information section, and a business contact information section. This will help the end user filling out the form know what type of information to add into each of the contact fields.

Reduced Errors When Filling Out the Template Fields

Static text can be added to templates with instructions on how to fill out certain fields. This can lead to less confusion for end users who fill out the templates. List fields such as radio buttons allow user-specified values, so administrators can have both the clean data of a list field and the option to enter custom data. For example, in a template that is associated with case documents, static text can describe the different types of information that should be entered in a case notes field, and the type of information that should not be entered because it is too sensitive.

Simplified Metadata Management

Instead of having multiple templates for similar document types, it is possible to have one template with field rules and sections. For example, in an employee file folder, instead of having a separate template corresponding to the various employee file types, there can be one template with a section for document-type specific fields that can be shown or hidden using field rules.

Reduce Missing Data

Since templates and fields are easier to fill out, end users are less likely to leave important fields blank or put incorrect values in required fields, which can have a positive impact on reporting and process automation. For lists of options where multiple selections can be made, checkboxes can be used to allow a user to easily select the appropriate choices without extraneous clicks, making it more likely for them to select all of the relevant items.

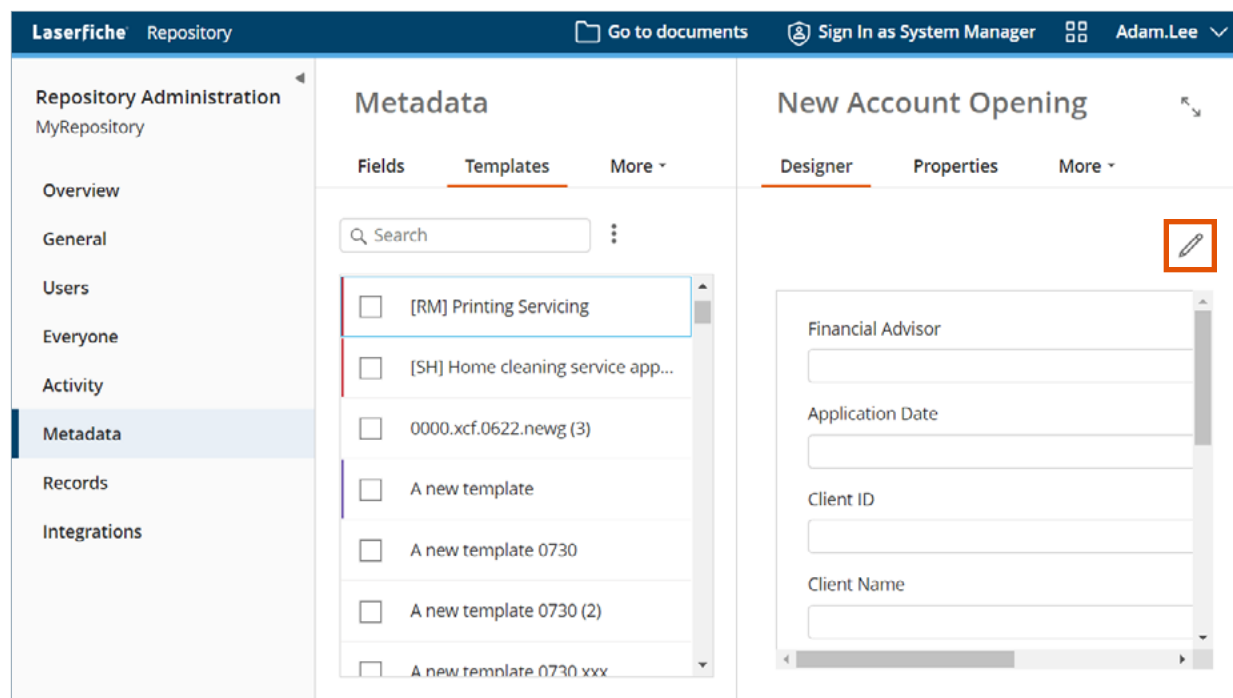
Lessen User Confusion

Since irrelevant fields can be hidden from users using field rules, users will not be faced with deciding which fields to fill out and which ones to leave blank. Additionally, static text instructions can help ensure users know what information to enter in the fields and takes the guess-work out of entering information. Field labels can also be used to customize a field name for each template, providing additional context. For example, a field called Date can be labelled as Birth Date in an employee file template and Filing Date in a different template.



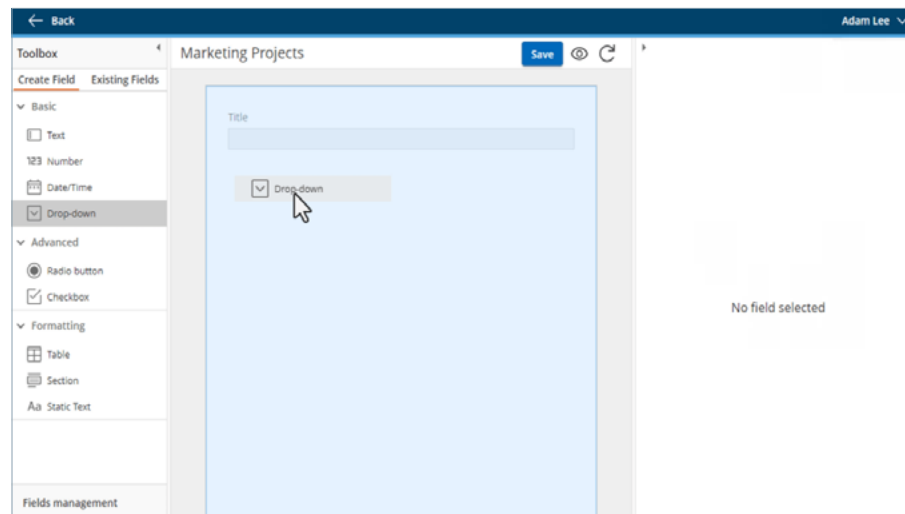
Designing a Metadata Template

Templates are designed in the Repository Administration section of the Laserfiche Web Client, under the Metadata tab. You can create a new template by clicking the + sign and providing a template name. You can edit an existing template by clicking the pencil icon in the template preview section.

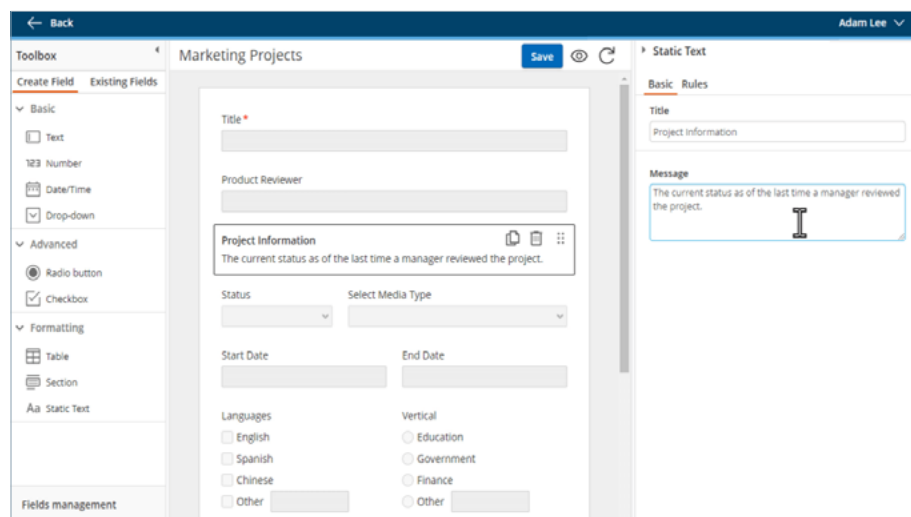


The Templates section of Repository Administration.

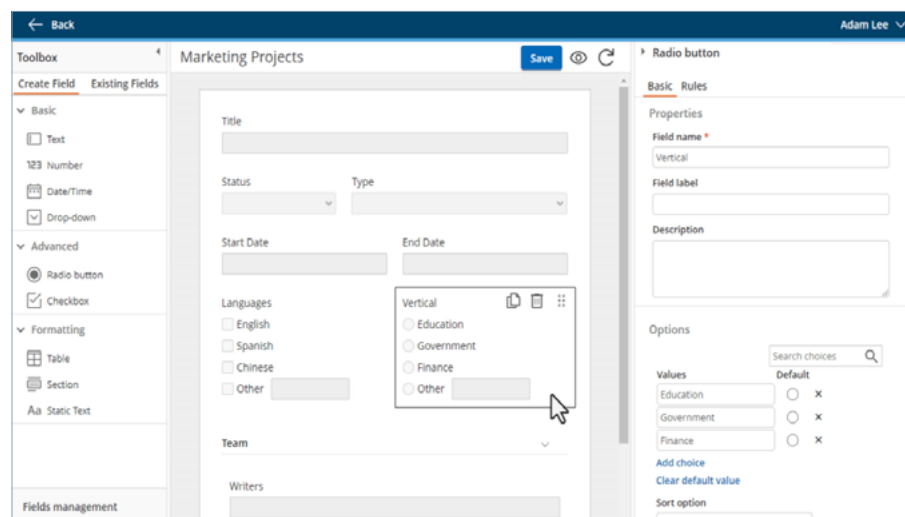
To customize a template, simply drag and drop various fields onto the blank canvas. You can add existing fields from the Existing Fields section, or create a new field by selecting a field type from the Create Field section and dragging it onto the canvas. For simplified administration and searchability, it is best practice to use existing fields when possible, and to customize the field display name for each template in which this field will be used. Fields can be grouped side-by-side for a more streamlined layout.



Adding a field to a template.



Adding static text to a template.



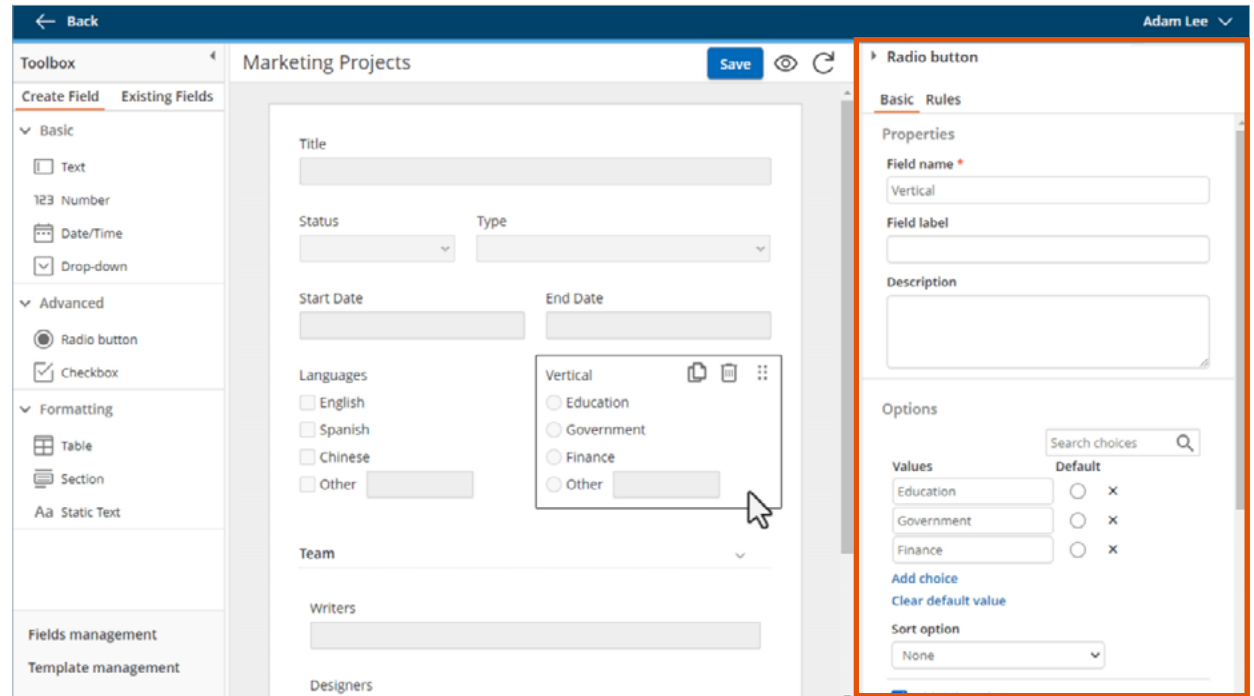
Customizing a radio button field.

Laserfiche 12 includes six different field types. Fields can be grouped in sections or tables. Static text can also be added to templates.

Free Text Fields	List Fields
Text	Drop-down
Date/Time	Radio button
Number	Checkbox



More information about the different field types can be found in the [Laserfiche 12 Product Documentation](#).

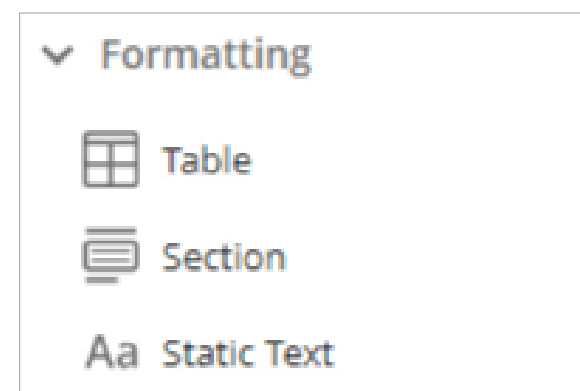


Customize fields using the Basic tab of the Details pane.

Customizing the Look of the Template

The template format can be customized by adding tables, sections and static text. Drag each element onto the canvas.

- **Tables** can be used when multiple related pieces of information should be shared side by side. For example, an Invoice template can have a table with information about the related purchase orders.
- **Sections** are useful for instances where you'd like to group certain types of fields together. For example, a Student File template can have a section that contains just the contact information of the student, and another section that contains information about the student's majors and minors.
- **Static text** is useful for providing instructions or clarifying information for the user filling out the template fields. For example, in a Job Application template, static text can be used to let users know what type of information should be included in an Interview Notes field.



Formatting options.

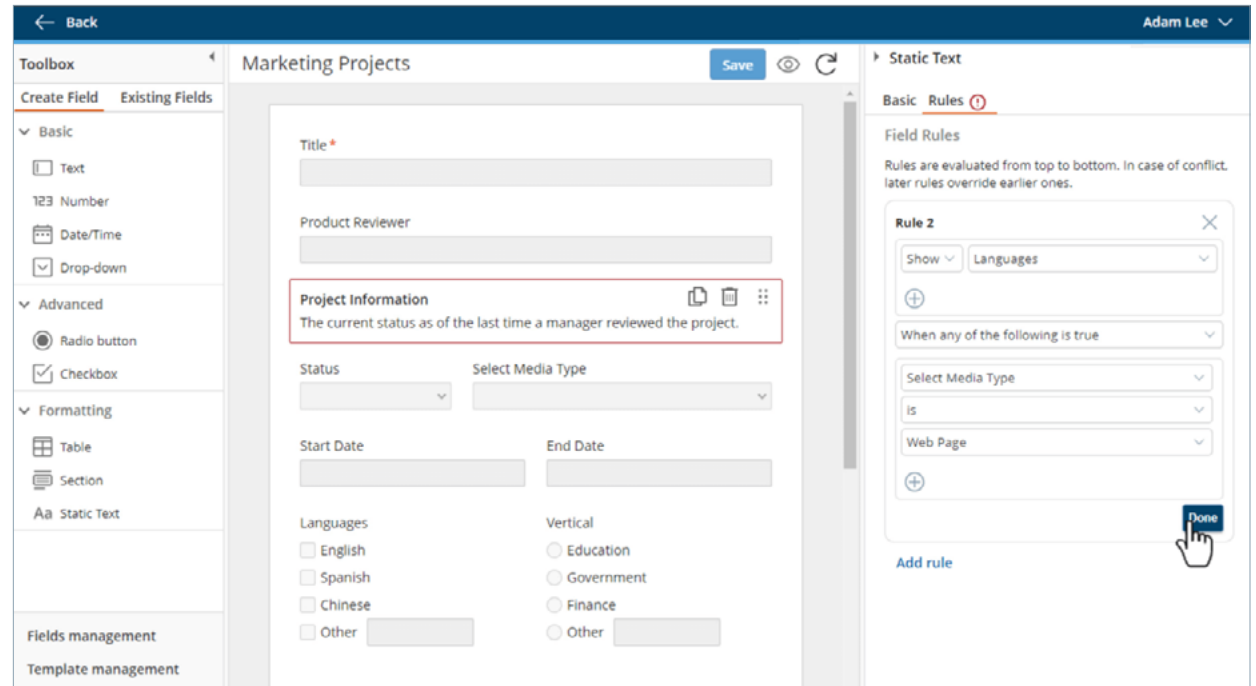
To further simplify templates for end users, field rules can be used to make the template dynamic as it is filled out. With field rules, certain fields or sections can be shown to the user or hidden when set criteria are met.

To add a field rule, select a field and open the Rules tab in the Details pane, choose the field or sections to show or hide, and specify the conditions.



eLearning Course:
[Enhanced Metadata Management with Laserfiche 12](#)

Product Documentation:
[Laserfiche 12](#)



Adding a field rule to a template.



About Laserfiche

Laserfiche is the leading SaaS provider of intelligent content management and business process automation. Through powerful workflows, electronic forms, document management and analytics, the Laserfiche® platform accelerates how business gets done, enabling leaders to focus on growth across the enterprise.

Laserfiche pioneered the paperless office with enterprise content management. Today, Laserfiche's cloud-first development approach incorporates innovations in machine learning and AI to enable organizations in more than 80 countries to transform into digital businesses. Customers in every industry — including government, education, financial services, healthcare and manufacturing — use Laserfiche to boost productivity, scale their business and deliver digital-first customer experiences.

Laserfiche employees in offices around the world are committed to the company's vision of empowering customers and inspiring people to reimagine how technology can transform lives.

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