Laserfiche Cloud Features

Laserfiche Cloud

Laserfiche Cloud is enterprise content management with built-in business process management tools in a secure and scalable Software-as-a-Service (SaaS) subscription. It enables organizations to securely manage and share documents, emails and other content as they flow through organizational processes.

- Provides recognized, industry-leading security with Amazon Web Services (AWS), file encryption.
- Granular access controls to manage security rights from a user-friendly administrative console.

Content Capture

There are many options to capture content in Laserfiche Cloud:

- **Laserfiche Scanning** allows paper documents to be easily converted into convenient electronic records in Laserfiche.
- **Laserfiche Snapshot** allows users to quickly print an archival image version of any file type to Laserfiche.
- **Drag-and-drop files** from a computer and import into a Laserfiche Cloud repository.
- **Laserfiche Import Agent** automatically uploads content from local storage as soon as it is detected as well as supports email archiving.
- **Quick Fields** provide advanced automated data capture sessions (available as an add-on).

Content Services

- Centralized document management
- Metadata - add tags to documents and folders
- Check documents in and out
- Search all content
- Create, copy, move, rename, download and delete documents
- Add documents to the Laserfiche repository from other apps
- Records Management

Integrations

Laserfiche Cloud also has built-in integrations to connect with core applications:

- The **Office Plug-in** allows users to quickly save **Microsoft Office**® documents to Laserfiche, and work with them from within Laserfiche. Use the Office Plug-in to quickly archive emails from Microsoft Outlook® and capture information about the emails.
- Import files saved in **Microsoft Office**®, **Google Drive**®, **OneDrive**® and **OneDrive for Business**® directly into Laserfiche.

- Request signatures on a document with **DocuSign**® (DocuSign® account is needed).
- **Laser App**® provides forms filling solutions for broker-dealers, financial advisors, insurance agents, and others in the financial industry (Laser App account is needed).

Forms

Forms allow process managers to create and publish web forms with an intuitive forms management system without requiring coding or scripting.

- **Attractive forms** can easily be created with preconfigured templates or customized with editable fonts, colors, uploaded images and layouts.
- **Drag-and-drop form elements** including fields, checkboxes and radio buttons onto a form to collect the exact information needed, in the precise format required.
- **Payment collection** allows payment to be collected with Braintree and Authorize.Net payment gateways.

Process Automation

Laserfiche Process Automation provides many tools to automate business processes and reduce manual work.

- **Graphical Workflow Designer:** Automate activities, assign team and individual tasks, extract data, route documents, and more without requiring code
- **Business Rules:** Easily define and manage business policy logic such as decision tables and formulas, in a centralized place separately from process logic
- **Data Management:** Define data structures and store data independently of processes to provide a single source of truth for data
- **Reporting and Analytics:** Use out-of-the-box reports or create custom reports on process data for insights to make informed decisions

Laserfiche App

The Laserfiche app (Android, iOS, or Windows) enables capture, upload, and secure access to documents, ability to complete tasks and submit electronic forms in Laserfiche while on the go – even save content and folders while offline.

Audit Trail

Auditing enables tracking activities performed in a Laserfiche repository. Information is tracked and efficiently stored in log files that are processed for use in reports. Combined with other aspects of the Laserfiche system, auditing not only helps to show compliance with legal regulations, but also contributes to the security of the Laserfiche repository.

Connector

Laserfiche Connector provides a streamlined experience for integrating Laserfiche with line-of-business applications such as Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) systems. A Laserfiche Connector profile can be configured to run a search, assign templates and fields to search results, scan a document, import a document, open a website, start another application, or write information to an application.

Single Sign-On

Account Administrators can provide single sign-on to Laserfiche Cloud through Multi-factor Authentication or Active Directory Federation Services. Multi-factor Authentication (MFA) provides added security for users and sensitive data.

Properly mapped users accounts with Active Directory Federation Services (AD FS) chose 'Sign in with AD FS' on the log-in page to sign into Laserfiche Cloud without specifying an additional username or password.

Add-Ons
Available for purchase separately

Public Portal

A Public Portal provides organizations a site for customizable external access to documents. Public Portal access permits non-authenticated views in user-friendly, read-only web portal.

Forms Portal

Forms Portal offers additional options for Forms that permit non-authentication or anonymous users to view and submit public starting forms. Laserfiche Forms can be shared with a customized and public URL.

Quick Fields*

Quick Fields is an advanced automated data capture solution. Once a session is configured in Quick Fields, users can run it automatically to:

- Capture documents
- Extract information
- Use the extracted information to sort or label the documents
- Add information such as annotations
- Store the documents in a Laserfiche repository
- Automate additional processes, features and functions

Community Users

Community Users allow non-employees or customers the ability to view documents in the repository, search and export documents with a single sign-on credential. Community Users can also participate in forms processes.

Software Developers Kit*

The Laserfiche Software Developers Kit provides tools for creating programs that interact with Laserfiche. The package includes the integration libraries, documentation, sample code for using the libraries, and tools for distributing programs.

Plus*

Laserfiche Plus creates a portable copy of information stored in a Laserfiche repository. Laserfiche documents published by Laserfiche Plus to portable media can be viewed by anybody, regardless of whether they have Laserfiche installed.

ScanConnect*

ScanConnect enables the use of ISIS scanning drivers with Laserfiche Scanning. A collection of ISIS drivers is included with ScanConnect. A list of supported scanners can be found on the Laserfiche Support Site. If your scanner is not listed, you may manually install any ISIS drivers your scanner's manufacturer has provided.

For more detailed descriptions of the features and functionality of Laserfiche Cloud, check out our Help Pages.

*Available on-premises