

QUICKER
BETTER
SAFER



Laserfiche Mobile

Joanna Slusarz

QUICKER BETTER SAFER

Laserfiche Mobile

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QUICKER BETTER SAFER

Laserfiche Mobile

Laserfiche

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INTRODUCTION

Smartphones and tablets are revolutionizing the way people interact with business content. As more and more content flows in and out of organizations of all sizes, it's becoming harder and harder to optimize the decision-making process by getting the right information into the right hands at the right time—particularly when decision makers are travelling, meeting with clients or participating in industry events.

Since 1987, Laserfiche has been committed to empowering organizations with the tools they need to make timely, intelligent business decisions. The Laserfiche Mobile app for iPhone and iPad enables employees—whether onsite or offsite, executive or field employee—to stay connected and productive anywhere in the world.

As a fully integrated part of the Laserfiche product line, Laserfiche Mobile provides an end-to-end solution that extends governance, risk and compliance standards to mobile devices, simplifying IT administration and oversight even as the bring your own device (BYOD) trend gains momentum.

At Laserfiche, our goal is to help your organization take advantage of the deep knowledge you have about the ways your processes should run more efficiently. This collection of real-world solutions provides an overview of ways customers around the world are gaining value from Laserfiche Mobile, from removing graffiti in real-time to automating hiring and more. We invite you to tap into their knowledge to help employees within your organization become more informed and more efficient than ever before.

This book contains a collection of solutions that focus on Laserfiche Mobile. For more than 130 additional solutions, please visit:

Laserfiche.com/SolutionExchange



TIPS FOR IT PROFESSIONALS

Laserfiche Mobile is an app for the iPhone and iPad that enables users to securely access and work with documents inside their Laserfiche repository from a mobile device. Administrators can take advantage of Laserfiche Mobile features such as extensive security, document libraries, geotags and more.



Learn best practices for implementing Laserfiche Mobile throughout your organization.

IMPLEMENTATION

Some things to keep in mind before implementation include:

- If many users will be uploading documents through Laserfiche Mobile, it is necessary to make sure that the Laserfiche Web Access Server can handle the load. Two cores in addition to what is necessary for the Laserfiche Web Access server are recommended to handle the processing and uploading of entries. This will be a total of four to six cores, depending on the number of users.
- It is important to double check the Laserfiche Mobile installation guide to make sure that the IIS settings are configured correctly.

Once the Laserfiche Web Access add-on is installed, it is time to configure Laserfiche Mobile. This is possible from the Laserfiche Mobile Configuration page.

The screenshot displays the 'Configuration' page for Laserfiche Mobile v 9.0.0. The 'Connection' section is active, showing a table of repositories and configuration options for authentication and geotagging.

Configuration

Connection

Repositories

| Default | Server Name | Repository Name | SSL (LFS) |
|--|----------------|-----------------|--------------------------|
| <input checked="" type="radio"/> | LFS.domain.com | MyRepository | <input type="checkbox"/> |
| <input type="radio"/> | LFS.domain.com | DemoRepo | <input type="checkbox"/> |
| New connection: <input type="text"/> <input type="text"/> <input type="checkbox"/> | | | |

Authentication

For repository: DemoRepo

Disable Remember Me

Laserfiche accounts: Allowed Denied

Windows accounts: Allowed Denied

Users listed below: Allowed Denied

Geotag

For repository: DemoRepo

Add a field for geotag information

Laserfiche Mobile v 9.0.0
Complink Internal Use Only

English



Settings that can be configured on this page include:

- **Setting which repositories will be available to Laserfiche Mobile.** If the organization has multiple repositories, the administrator may not want all of them to be accessible from a mobile device.

Connection

Repositories

| Default | Server Name | Repository Name | SSL (LFS) |
|--|----------------|-----------------|--------------------------|
| <input checked="" type="radio"/> | LFS.domain.com | MyRepository | <input type="checkbox"/> |
| <input type="radio"/> | LFS.domain.com | DemoRepo | <input type="checkbox"/> |
| New connection: <input type="text"/> <input type="text"/> <input type="checkbox"/> | | | |

- **JPEG compression.** If space is a limiting factor, JPEG compression can be used on import to reduce the size of images stored in Laserfiche while still preserving color. Users can also enable compression on the app side (during capture) in order to improve upload times, especially when using the cell network rather than Wi-Fi.
- **Geotags.** Enabling geotags allows geographical location information obtained from the photo during capture to be stored in an associated field. More information about this feature can be found in the “Use Laserfiche Mobile to Combat Graffiti” article.
- **Security.** The Laserfiche Mobile Configuration page allows the administrator to enable automatic log-out and disable automatic log-in and export. More information about security can be found in the “Best Practices in Laserfiche Security” article.

LOGGING IN FOR THE FIRST TIME

To help users log in to Laserfiche Mobile for the first time, an administrator can send them a Laserfiche Mobile link in an email. When a user clicks on the link, Laserfiche Mobile automatically adds the user’s current server and specified repository to its list of remembered servers and repositories. This prevents errors by saving the user from having to look up and manually enter the server address when logging in.

The Laserfiche Mobile URL is configured as follows:

LfMobile://MyWebAccessServer/laserfiche/index.aspx?db=MyRepository

MyWebAccessServer corresponds to the name of the Laserfiche WebAccess server and MyRepository corresponds to the name of the repository.

SETTING GROUND RULES

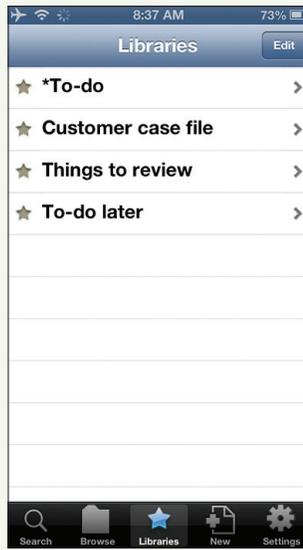
Before allowing users full access to the repository with Laserfiche Mobile, the organization should have clear security and capture policies in place.

- It is important to educate users about the security settings that are in place.
- Users should be aware of the organization’s capture policy. This policy should address these questions:
 - Is client-side compression going to be implemented or do the photos have to be submitted to Laserfiche in their original size?
 - Are the photos of documents going to be cropped automatically or will they be cropped manually later with Laserfiche PhotoDocs?
 - Are geotags going to be implemented or is storing location information irrelevant to the organization’s business?

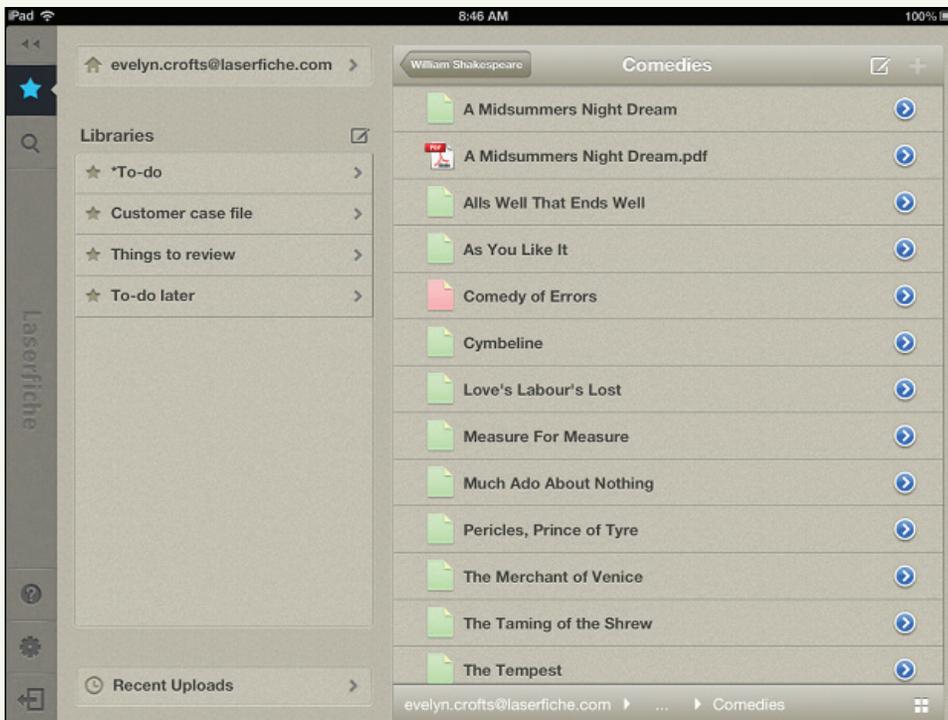
If users will access Laserfiche Mobile outside the office, they should also be instructed on how to set up VPN on their iPhone or iPad.



Encourage users to take advantage of Laserfiche Mobile's features, including libraries. Like the "Favorites" found in Microsoft Internet Explorer, libraries are useful for storing lists of entries that are accessed frequently by users, or as a way to easily mark an entry as part of a "to-do" list.



View of Libraries on an iPhone.



View of Libraries on an iPad.

BENEFITS OF LASERFICHE MOBILE

Implementing Laserfiche Mobile within the organization can result in the following benefits:

- Employees can play an integral role in business processes even while outside the office.
- With optimum security features configured, employees can review and work with Laserfiche documents without worry of data being stolen or compromised.
- Photos can be easily captured with the iPad and iPhone and sent to Laserfiche efficiently and quickly.



MANAGE MUNICIPAL COURT FILES

In the Wichita Falls municipal court, a lot of work revolves around Class C misdemeanor offenses such as traffic tickets and violations of city code. Managing these court case files through their records lifecycle used to be a time consuming, error prone and paper-heavy process. Here is how Laserfiche Records Management Edition and Laserfiche Mobile for iPad simplified this process, while allowing the Wichita Falls municipal court to adhere to the Texas State Library records retention rules.



Patrick Gray, Systems Applications Analyst, describes how Wichita Falls, TX, uses Laserfiche to manage municipal court files with Laserfiche Mobile for iPad.

FROM CAPTURE TO RECORDS RETENTION

Court clerks import case documents into the “Z-Quality Control” folder in Laserfiche directly from within the Infosol court management system with the help of Affinity, a screen scraping tool that serves as the bridge between Laserfiche and Infosol. Once a clerk clicks the Affinity button inside the court system, the documents are sent to Laserfiche, a template is applied and all of the fields except for “Active File Date” and “Dead File Date” are automatically populated.

The screenshot shows a metadata form window titled "Metadata - 2011026606 - Case Papers - HALE". The form is organized into tabs: "Fields", "Tags", "Links", and "Versions". The "Fields" tab is active, showing a "Template" dropdown set to "Courts - Case Files". Below the template, several fields are populated with data:

- Active File Date: 05/23/2012
- Cause Number (required): 2011026606
- Courts - Document Type (required): Case Papers
- Case Status: Community Service
- First Name: ROBERT DEWAYNE
- MI: (empty)
- Last Name: HALE
- Date: 11/28/2011
- Dead File Date: / /

At the bottom of the form, there is an "Add/Remove Fields..." button and three buttons: "OK", "Cancel", and "Help".



The "Case Status" is set as "Pending" and the file is automatically routed into the "Municipal Court" - "Active Case Files" - "Pending" folder in Laserfiche.

Metadata - 2011026606 - Case Papers - HALE

Fields Tags Links Versions

Template: Courts - Case Files

Active File Date: 5/23/2012

Cause Number (required): 2011026606

Courts - Document Type (required): Case Papers

Case Status: Community Service

- Active
- Bail Bond
- Capias Pro Fine
- Closed
- Community Service
- Deferred
- Driving Safety Course
- Extension
- Jail
- Non-Compliance
- Overdue Juvenile
- Payment Plan
- Pending
- Pretrial
- Trial
- Unassigned
- Void
- Warrant

OK Cancel Help

Active Case Files - Laserfiche

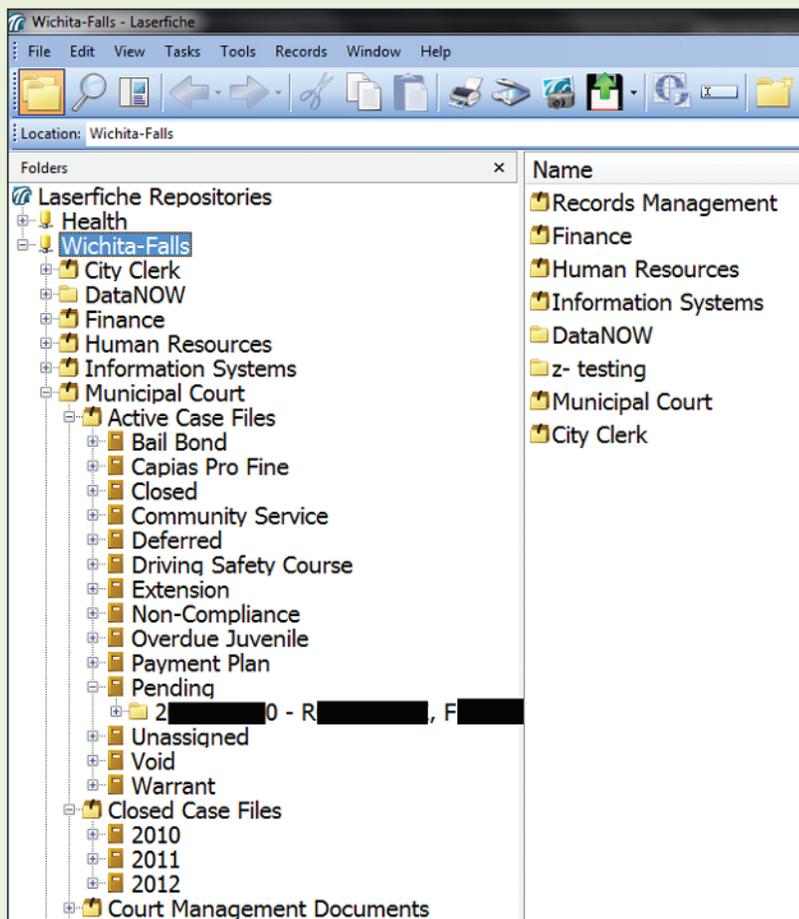
File Edit View Tasks Tools Records Window Help

Location: Wichita-Falls\Municipal Court\Active Case Files

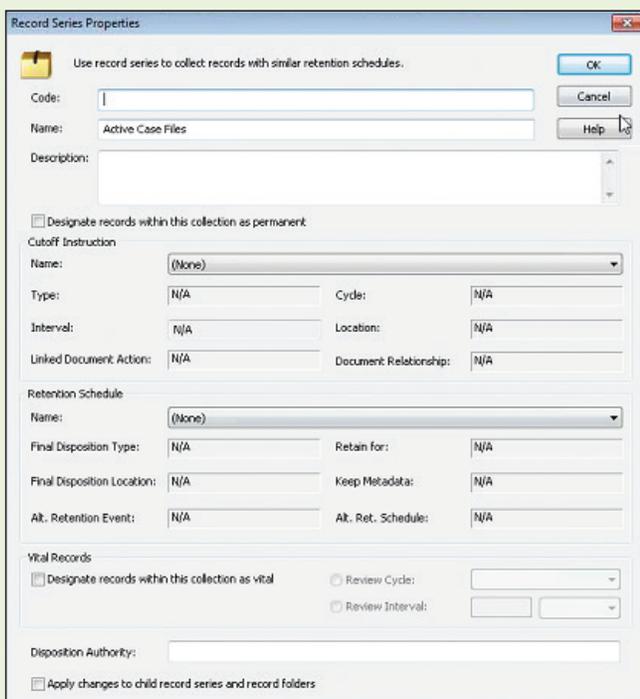
| Folders | Name |
|----------------------------|-----------------------|
| Laserfiche Repositories | Void |
| Health | Unassigned |
| Wichita-Falls | Driving Safety Course |
| City Clerk | Closed |
| DataNOW | Pending |
| Finance | Bail Bond |
| Human Resources | Community Service |
| Information Systems | Overdue Juvenile |
| Municipal Court | Non-Compliance |
| Active Case Files | Payment Plan |
| Closed Case Files | Extension |
| Court Management Documents | Warrant |
| Voided Tickets | Capias Pro Fine |
| Z-Quality Control | |
| ZZ-Test | |
| Records Management | |
| z- testing | |
| Recycle Bin | |



A folder is then created based on the "Cause Number" and "Name" of the defendant where the related documents are stored.



Because these records are active, there is no retention applied to them.





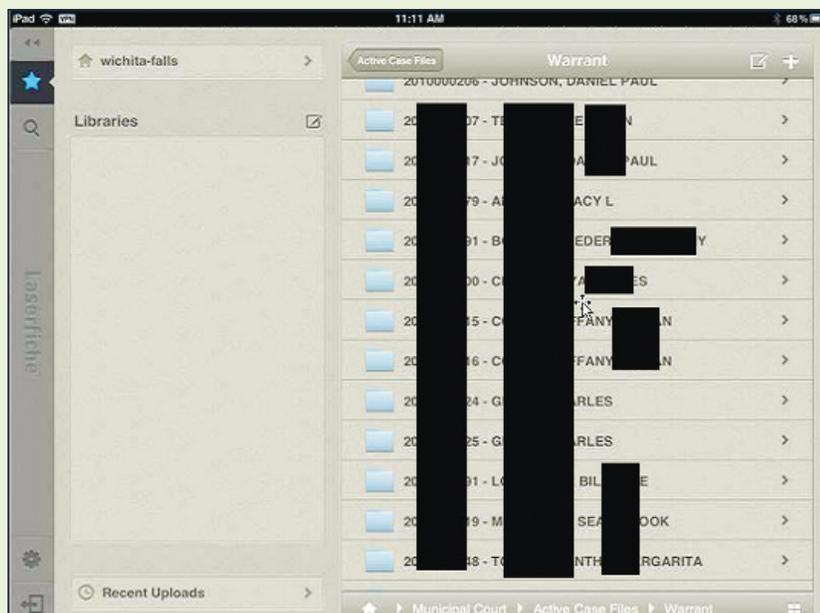
When the case is in court, the judge logs into the Laserfiche Mobile for iPad app directly from the bench and opens up the defendant's case file. After making a judgment, he simply changes the value of the "Case Status" field to whatever he deems necessary and Laserfiche Workflow routes all of the case documents into the appropriate folder within the "Active Case Files" records series.

The screenshot shows a mobile application interface for editing a case file. The form is titled "Fields" and contains several input fields:

- Case ID:** 2011025905
- Courts - Document Type:** Case Papers
- Case Status:** Warrant
- First Name:** REBECCA RIOS
- MI:** (empty)
- Last Name:** JOHNSON
- Date:** November 18, 2011
- Dead File Date:** (empty)
- Creation Date:** Jan 13, 2012 10:36:29 AM
- Last Modified:** (empty)

At the bottom of the form, there is a button labeled "+ Add/Remove Fields" with a right-pointing arrow.

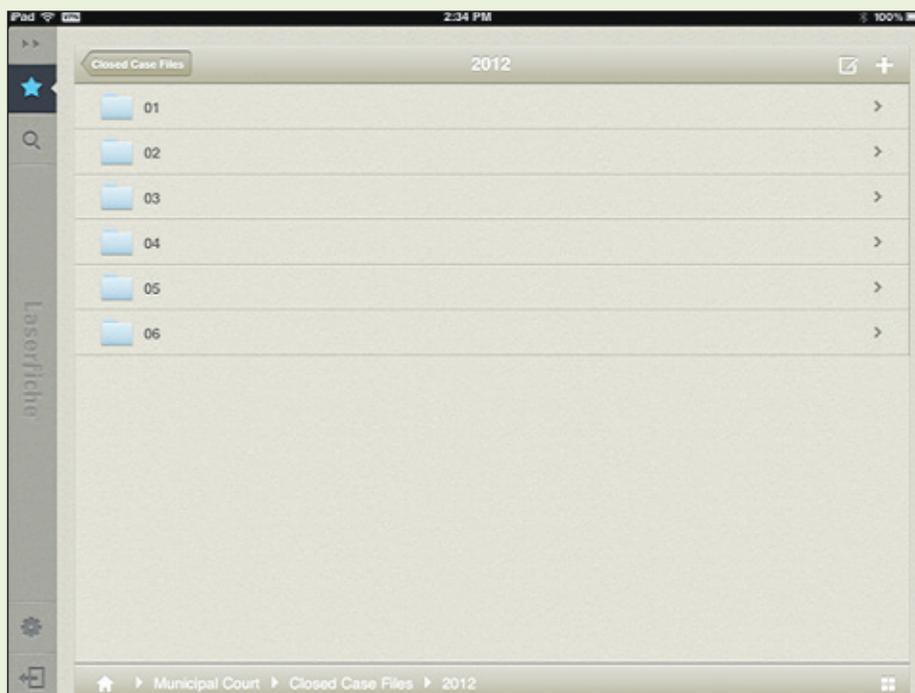
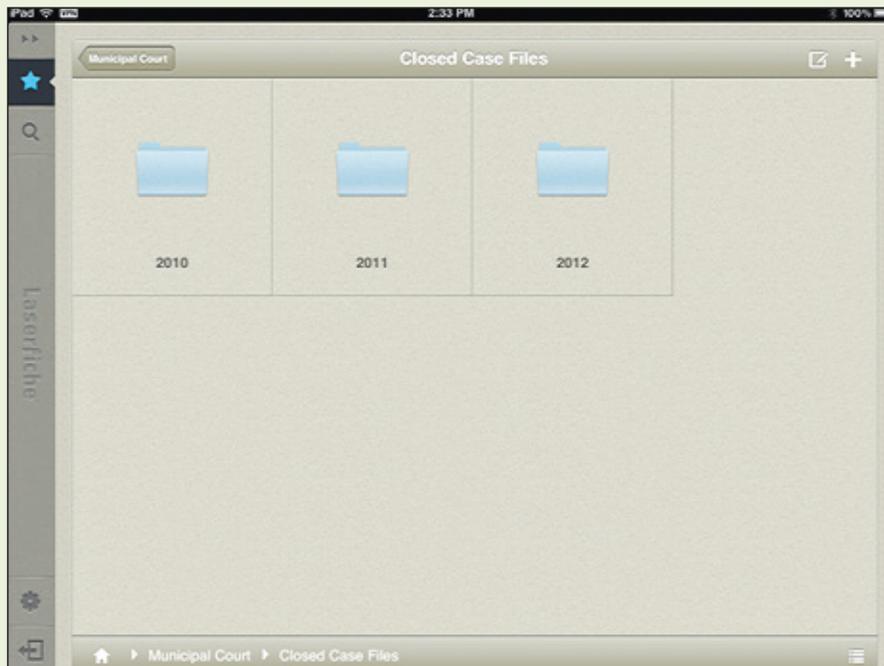
For example, if the judge wants to issue a warrant for the defendant, he updates the "Case Status" to "Warrant" and the case file is automatically moved to the "Warrant" folder in the repository.





If a case file is dismissed, the judge fills in the “Dead File Date” in the case file template. This triggers Laserfiche Workflow to:

- Add this date to the metadata of all of the documents in the case file.
- Route the entire file to the “Closed Case Files” records series.
- File it by year and month for easy retrieval at a later time if necessary.





Once the file is moved to “Closed Case Files,” retention rules are automatically applied. According to the Texas State Library Record Retention Rules, we have to keep all files for five years before destroying them. We use a time-based cutoff instruction where records are destroyed on a yearly basis. They are eligible for cutoff in January following their “Dead File Date” and eligible for destruction by the Records Manager five years from then.

Record Series Properties

Use record series to collect records with similar retention schedules. OK

Code:

Name: Cancel Help

Description:

Designate records within this collection as permanent

Cutoff Instruction

Name:

Type: Cycle: mg

Interval: Location:

Linked Document Action: Document Relationship:

Retention Schedule

Name:

Final Disposition Type: Retain for:

Final Disposition Location: Keep Metadata:

Alt. Retention Event: Alt. Ret. Schedule:

Vital Records

Designate records within this collection as vital Review Cycle:

Review Interval:

Disposition Authority:

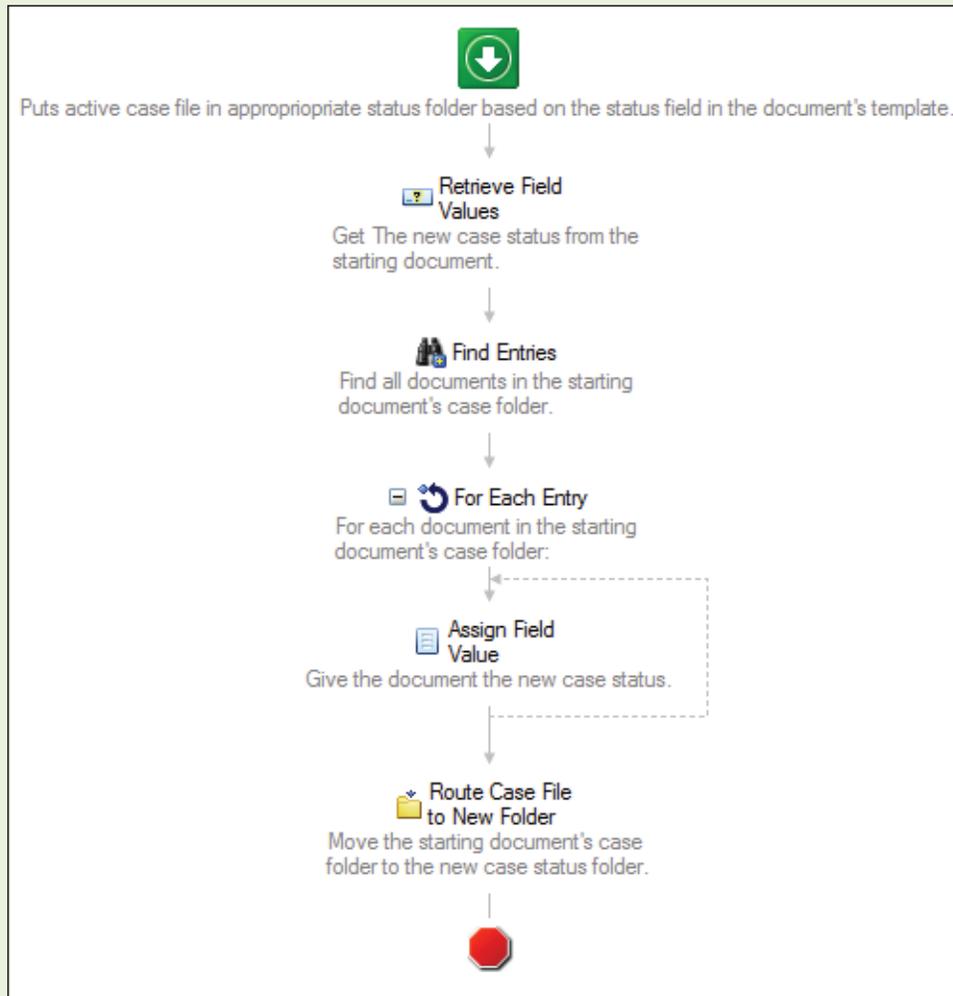
Apply changes to child record series and record folders



WHAT HAPPENS BEHIND THE SCENES

The entire municipal case management process is powered by Laserfiche Workflow. Different workflows run behind the scenes, routing files to various locations within the repository.

This workflow routes the case file to a different folder within the “Active Case Files” records series based on the updated value of the “Case Status” field:





This workflow looks for a “Dead File Date” and routes the case file to the “Closed Case Files” records series where it is stored by year and month:





LASERFICHE MOBILE AND SECURITY

“Let your business process drive your security needs.”

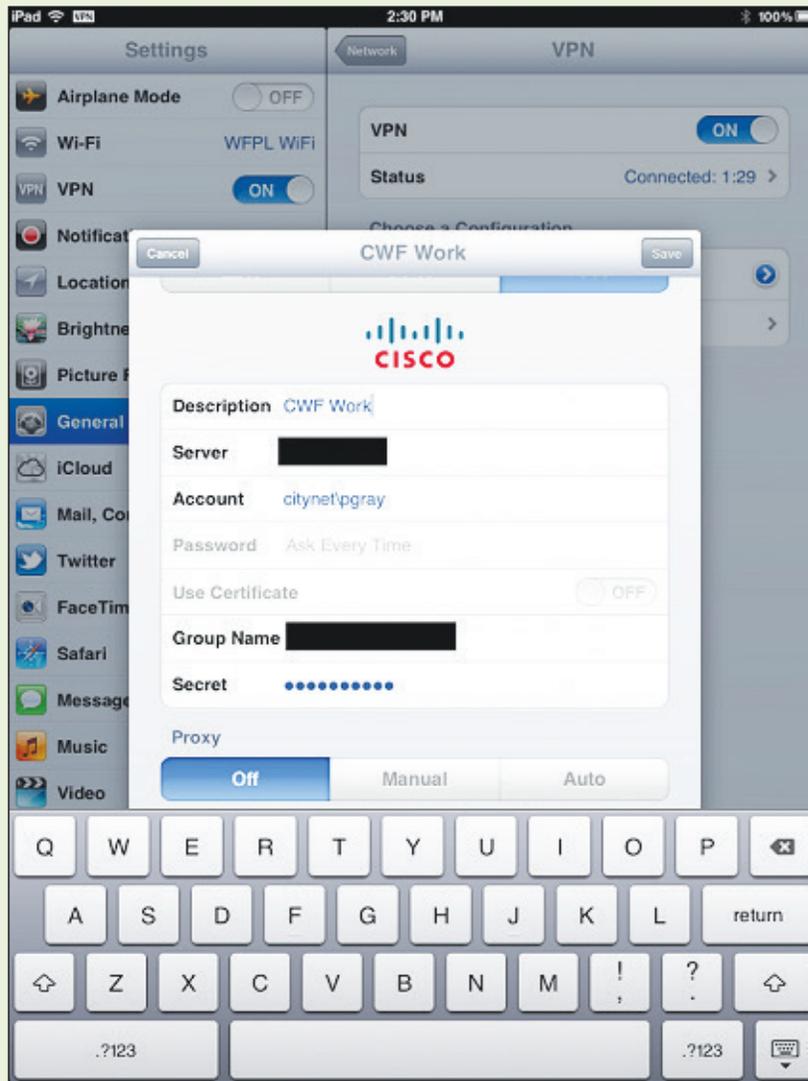
Security and privacy are extremely important at the Wichita Falls municipal court. We have taken the following precautions to make sure that we maintain optimal security of our Laserfiche system at all times.

- Security is granted to all of our Laserfiche users based on group membership. For example, court clerks who need administrative access have different permissions than court clerks who only need view access to documents. While the first group is allowed to perform any action including deleting and modifying documents, the second group can only view and print.

| Groups | Description | Feature Rights | Privileges |
|----------------------|-------------|-----------------------------------|--------------------|
| City Clerk - Admin | | ScnImpSchPrtExpEdtMovProPrpDelMig | Rcd |
| City Clerk - Users | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| City Clerk - Viewers | | SchPrtExp | (None) |
| EBT - Admins | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| EBT - Users | | ScnImpSchPrtExpEdtMovProPrpMig | (None) |
| EBT - Viewers | | SchPrtExp | (None) |
| Finance - Admins | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| Finance - Users | | ScnImpSchPrtExpEdtMovProPrpMig | (None) |
| Finance - Viewers | | SchPrtExp | (None) |
| HR - Admins | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| HR - Users | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| HR - Viewers | | SchPrtExp | (None) |
| LF-Admins | | ScnImpSchPrtExpEdtMovProPrpDelMig | TstVolEntMetTcrStp |
| MunCourts - Admins | | ScnImpSchPrtExpEdtMovProPrpDelMig | Rcd |
| MunCourts - Users | | ScnImpSchPrtExpEdtMovProPrpMig | (None) |
| MunCourts - Viewers | | SchPrtExp | (None) |
| Purchasing - Admins | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| Purchasing - Users | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| Purchasing - Viewers | | SchPrtExp | (None) |
| Risk Mgt - Admins | | ScnImpSchPrtExpEdtMovProPrpDelMig | (None) |
| Risk Mgt - Users | | ScnImpSchPrtExpEdtMovProPrpMig | (None) |
| Risk Mgt - Viewers | | SchPrtExp | (None) |



- We have set up VPN on the iPads that we've distributed to our judge and clerks so that they are able to access Laserfiche from any wireless access point within the court.





- The iPads are configured to connect to a wireless network only from within the confines of the court building. We have also set up an HTTP proxy to monitor the internet traffic and prevent certain internet activity such as streaming media.



- The wireless network within our courts is available only to municipal court-enabled devices. Users must have specific permission and be integrated with our Active Directory to be able to connect.

BENEFITS OF LASERFICHE

With Laserfiche, Wichita Falls has seen the following benefits:

- More space thanks to the removal of 13 filing cabinets.
- Enhanced employee productivity by automating review and approval processes.
- Complete adherence to the Texas State Library records retention rules.



SIMPLIFY MEETINGS

Agendas for city council meetings can be over 100 pages long. Printing one copy for each council member takes a lot of paper and ink. During a meeting, looking through an agenda to find a particular agenda item can be time consuming and frustrating. Laserfiche Mobile for the iPad makes managing agendas during meetings easy.



Local governments: Learn how to use Laserfiche Mobile for the iPad to make viewing agendas convenient.

LASERFICHE MOBILE

Once created, city council meeting agendas have pages generated in the Laserfiche Client. During the city council meeting, each council member uses Laserfiche Mobile to view the agenda and any supporting documentation on his iPad.

The screenshot shows the Laserfiche Mobile app interface on an iPad. The top status bar displays "iPad", signal strength, "9:57 AM", and "92%" battery. The app's navigation bar includes a "city council" tab, a document icon, a search icon, a settings gear, and a messages icon. The main content area displays the following text:

city council | _PDF Agenda Packet 2013 02_19 LARGE FILE SIZE | Page 1 of 137

**CITY COUNCIL REGULAR MEETING
AGENDA
February 19, 2013 – 7:00 P.M.**

City Council Chambers

THE CITY COUNCIL ALSO SITS AS THE CITY OF POWAY PLANNING COMMISSION, POWAY HOUSING AUTHORITY, PUBLIC FINANCING AUTHORITY AND SUCCESSOR AGENCY TO THE POWAY REDEVELOPMENT AGENCY

CALL TO ORDER

ROLL CALL

PLEDGE OF ALLEGIANCE

PRESENTATIONS

PUBLIC ORAL COMMUNICATIONS

Persons speaking during Public Oral Communications may address the Council on any subject matter within the Council's jurisdiction that is not listed as an item on the agenda. State law generally prohibits the Council from taking action on any issue not included on the agenda. Your concerns will be referred to staff. **Comments are limited to three (3) minutes.**

NOTE: The agenda is posted and provided 11 days prior to the City Council meeting. By State law, items can be added up to 72 hours prior to the meeting. Items with a "#" symbol are in preparation. If items are added after original agenda is posted, new items will be listed on an Amended Agenda posted the Friday prior to the meeting.

For your convenience, a complete Agenda Packet is available for public review at City Hall and on the City's website at

Page 1

– City Council Agenda – February 19, 2013

1. CONSENT CALENDAR (Approved By Roll Call Vote)

The Consent Calendar may be enacted in one motion by the Council without discussion unless a Councilmember, a member of the public, or City staff requests that an item be

The bottom of the screen shows the iPad's home indicator and a navigation bar with a back arrow, a breadcrumb trail "city council > _PDF Agenda Packet 2013 02_19...", and icons for image, text, and document.



In order to make it easy for council members to follow along with the agenda items being discussed, the city makes use of annotations. After the agenda is printed into Laserfiche, an administrative assistant scrolls through the agenda and places a sticky note in every major section. During meetings, city council members can scroll through the document as the meeting progresses, but also quickly navigate to any other agenda item by clicking on a sticky note in the document's annotation pane.

The screenshot shows an iPad interface with a PDF viewer. On the left, there is an 'Annotations' pane titled 'Laserfiche' with a 'View annotations:' toggle set to 'OFF'. The pane lists five pages with sticky notes:

- Page 5:** Sticky Note 1 - 2/15/2013. Approval of Reading by Title only and Waiver of Reading in full of Ordinances on Agenda.
- Page 6:** Sticky Note 1 - 2/15/2013. Ratification Approval of Warrant Register
- Page 27:** Sticky Note 1 - 2/15/2013. Approval of Meeting Minutes
- Page 35:** Sticky Note 1 - 2/15/2013. Approval of Parcel Map for TOM 06-03; Lamagno, Applicant
- Page 50:** Sticky Note 1 - 2/15/2013. Ordinance adding Ch. 9.08 to the PMC re_Synthetic Timulants_Cannabinoids

The main PDF viewer shows the following content:

city council | _PDF Agenda Packet...2_19 LARGE FILE SIZE | Page 1 of 137

**CITY COUNCIL REGULAR MEETING
AGENDA
February 19, 2013 – 7:00 P.M.**

City Council Chambers

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... | city council | _PDF Agenda Packet... | [Navigation icons]



ADVANTAGES OF LASERFICHE MOBILE

The city discovered the following benefits from using Laserfiche for managing city council meeting agendas:

- Since the agenda is stored in Laserfiche, pages of content no longer need to be printed, copied and distributed.
- Multiple council members can access the agenda at the same time from a single location in Laserfiche.
- Council members can follow along with the meeting discussion and don't have to spend time rifling through pages to find required information.
- Since the agenda is converted into a Tiff format, it is read-only and non-editable.
- Agendas are now accessible to the public via Laserfiche WebLink.



LASERFICHE MOBILE FOR CONSTRUCTION

Trucking in construction can be fraught with problems including fraud, difficulty matching invoices with truck papers and delays in sending relevant paperwork to accounting. Here is how one construction company uses Laserfiche Mobile to accept trucking deliveries quickly and accurately while creating real-time reports for the project manager.



Learn how to use Laserfiche Mobile for construction management.

THE PROCESS

When performing construction at a site such as an airport or highway, large quantities of materials must be delivered by truck. Supply companies are contracted to deliver certain quantities of materials each day, usually split into multiple deliveries. The truckers and the supply companies get paid on delivery of the materials, but confirming the right deliveries, quantities and timeliness is left to the construction company and its project managers. Having a real-time accounting process in place makes sure verification and then payment can be done quickly and correctly.

1. A truck arrives at the construction site and checks in with the shift manager before its material is unloaded. The shift manager takes photos of the truck and the truck papers with his iPhone and immediately sends them to Laserfiche with the Laserfiche Mobile app.





2. The uploaded photo, associated timestamp and GPS data prove that a particular truck was at that construction site at that time. GPS data is configured on the server-side so that it cannot be manipulated.



3. Back at the office, the accounting assistant opens the photograph(s) of truck papers in Laserfiche.

| | | |
|--|---------------------|-------------------------------|
| Shipped From: Rock and Sand Co. Plant 2 | 28-Feb-3013 | Ticket No. |
| 1000 Main St. | | 1241 |
| | Levy Proj: 12404 | Order #: 53 |
| Sold To: Laser Construction | PO NUMBER: 20030-98 | |
| Cust # 2244 3545 Long Beach | | |
| Long Beach | | |
| Laser Construction Company | | |
| Proj Description: Pick Up 3R/22L Parking – Shopping Center | | |
| Ship To: Pick Up 3R/22L | | |
| Dely Instructions: Pick Up for Parking 3R/22L | | |
| Shopping Center | | |
| Carrier | Truck LT24356 | LTH44 |
| | Mati Description | |
| 3446 | P-209 AG | |
| | LCC | Deliv Method 01 FO8 |
| | TOTAL WEIGHT: | Gross Tons Tare Tons Net Tons |
| | | 72.13 25.09 47.04 |
| | | 72.13 25.09 47.04 |
| Load Time: | 12:44 | |
| Time Printed: | 12:57 | |



4. He inputs other pieces of data needed for tracking deliveries into the document's template fields.

Template: Truck Paper

Broker
Steel Magnolias

Truck #
123

Ticket #
1241

Destination
Staging Area

Material
Concrete

Quantity
12

UOM
Ton

Material Vendor
Vulcan Materials

Material Ticket #
456

In-Out
In

5. The accounting assistant also prepares invoices and other accounting documents. Several times a day, the accounting assistant searches for relevant documents in Laserfiche. A saved column view allows the accounting assistant to view all of the identifying information about each photo.

Search Results - Laserfiche Web Access

Evlyn@Elysium | Settings | Help | Support Site | Log Out

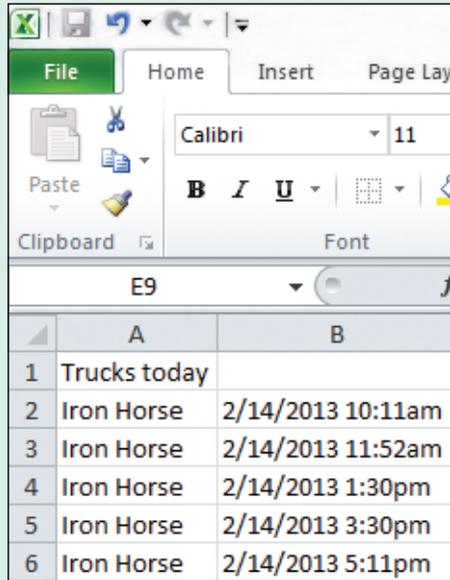
| Name | Broker | Truck # | Ticket # | Destination | Material | QTY | UOM |
|---|------------------|---------|----------|--------------|-------------------|-------|-----|
| Iron Horse 2/18/2013 3:23:27 PM | Iron Horse | 121 | 6795 | Runway | P-209 Aggregate | 89 | Ton |
| Iron Horse 2/18/2013 9:18:42 AM | Iron Horse | 28771 | 123 | Staging Area | P-209 Aggregate | 47.27 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Steel Magnolias | Steel Magnolias | 123 | 1232 | Staging Area | terra cotta | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Iron Horse | Iron Horse | 100 | 1240 | Staging Area | Stone dry stacked | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Steel Magnolias | Steel Magnolias | 123 | 1241 | Staging Area | Concrete | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Awesome Trucking | Awesome Trucking | 500 | 1242 | Staging Area | concrete block | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Iron Horse | Iron Horse | 100 | 1243 | Staging Area | Urbanite | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A USA Trucking | USA Trucking | 2 | 1244 | Staging Area | glass brick | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Steel Magnolias | Steel Magnolias | 123 | 1245 | Runway | Concrete | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Iron Horse | Iron Horse | 99 | 1233 | Staging Area | Artificial stone | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Awesome Trucking | Awesome Trucking | 500 | 1234 | Staging Area | Cinder block | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Awesome Trucking | Awesome Trucking | 501 | 1235 | Staging Area | Urbanite | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Iron Horse | Iron Horse | 99 | 1236 | Staging Area | Concrete | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Steel Magnolias | Steel Magnolias | 123 | 1237 | Staging Area | Concrete | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Steel Magnolias | Steel Magnolias | 124 | 1238 | Staging Area | brick | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Iron Horse | Iron Horse | 99 | 1239 | Staging Area | P-209 Aggregate | 12 | Ton |
| Steel Magnolias 2/18/2013 11:00:05 A Awesome Trucking | Awesome Trucking | 500 | 1246 | Runway | Concrete | 12 | Ton |

Found: 17 matching entries (1 selected)

Laserfiche Web Access version 9.1 - About - ©2003-2013 Laserfiche



6. The accounting assistant then exports this report into Microsoft Excel. This report is used to track the following information:
 - a. The number of trucks from each company that arrived at the construction site that day.
 - b. The number of rounds that each truck made during the shift.

A screenshot of a Microsoft Excel spreadsheet. The ribbon shows the 'Home' tab with the 'Font' group selected. The font is 'Calibri' and size '11'. The spreadsheet has columns A and B, and rows 1 through 6. The data is as follows:

| | A | B |
|---|--------------|-------------------|
| 1 | Trucks today | |
| 2 | Iron Horse | 2/14/2013 10:11am |
| 3 | Iron Horse | 2/14/2013 11:52am |
| 4 | Iron Horse | 2/14/2013 1:30pm |
| 5 | Iron Horse | 2/14/2013 3:30pm |
| 6 | Iron Horse | 2/14/2013 5:11pm |

7. The shift manager checks this spreadsheet before approving payment on the delivery slips the drivers present to him at the end of the shift. The project manager uses these reports to make sure that the right amount of goods is delivered each day to guarantee that the project will be completed on time.



ADVANTAGES OF LASERFICHE MOBILE

Implementing Laserfiche Mobile at the construction company has resulted in the following benefits:

- Multiple images can be quickly sent over to Laserfiche thanks to Laserfiche Mobile's application-side photo compression.
- Delivery fraud is prevented because the shift manager can easily prove how many times a particular truck arrived during a particular shift.
- Real-time accounting results in the construction company being billed the correct amount each time for materials.



COMBAT GRAFFITI

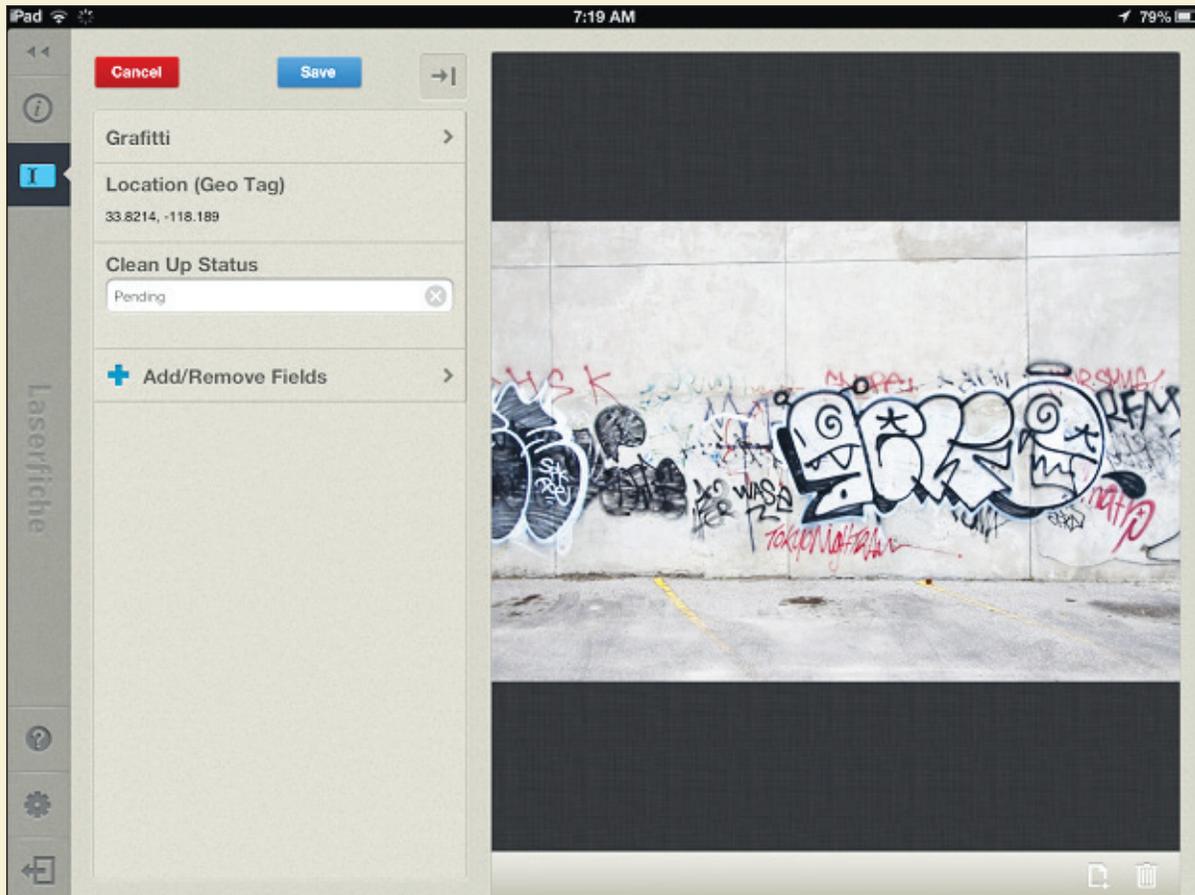
Cleaning up graffiti can be a time consuming process. First, someone at the city must be notified of the graffiti and its exact location. Afterward, cleaning crews must be sent over to clean it up. It's often difficult to catch up with all of the graffiti that needs to be removed. Here is how Laserfiche Mobile can make cleaning up graffiti an almost real-time process.



Learn how to use geotags in Laserfiche Mobile to quickly clean up graffiti.

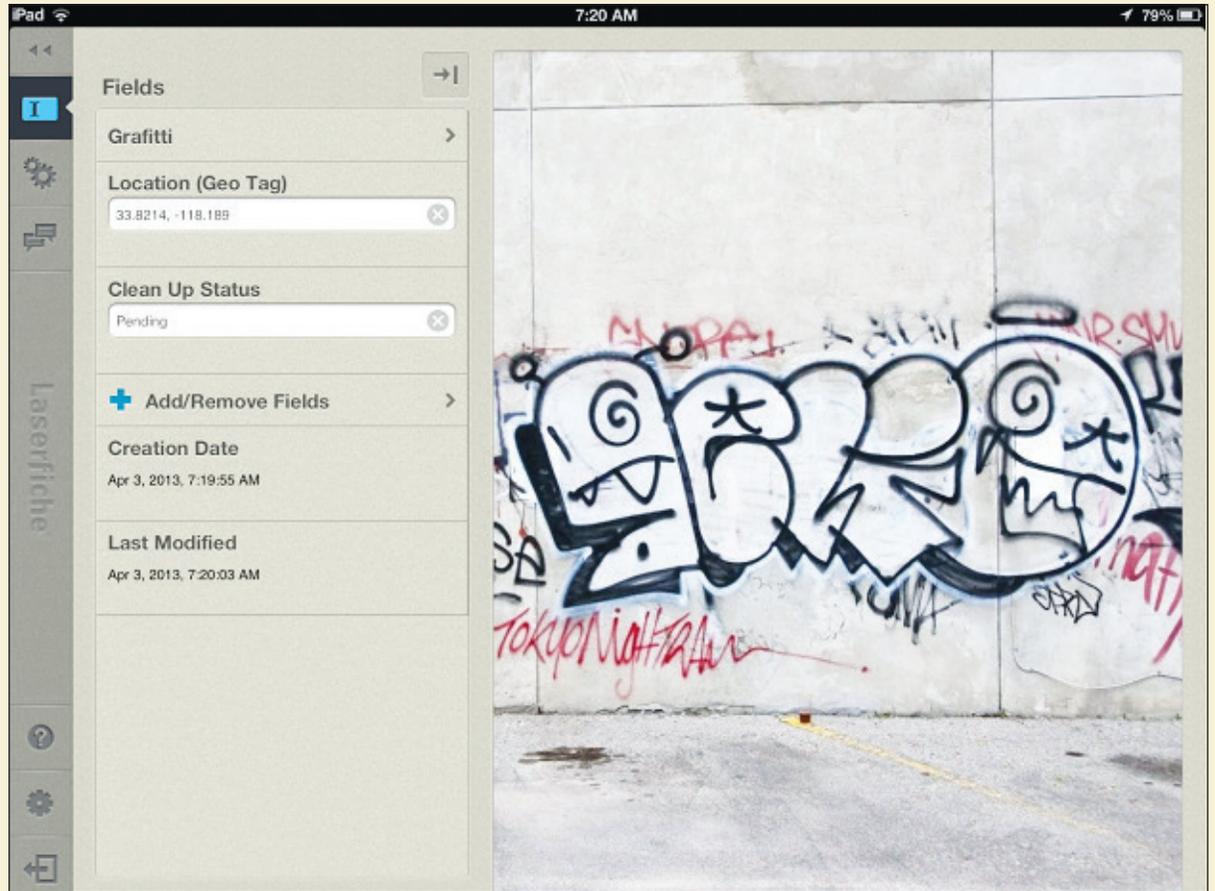
THE PROCESS

Whenever a police officer or other city employee notices some new graffiti around the city, he simply takes a photo of the graffiti on his iPhone or iPad with Laserfiche Mobile.



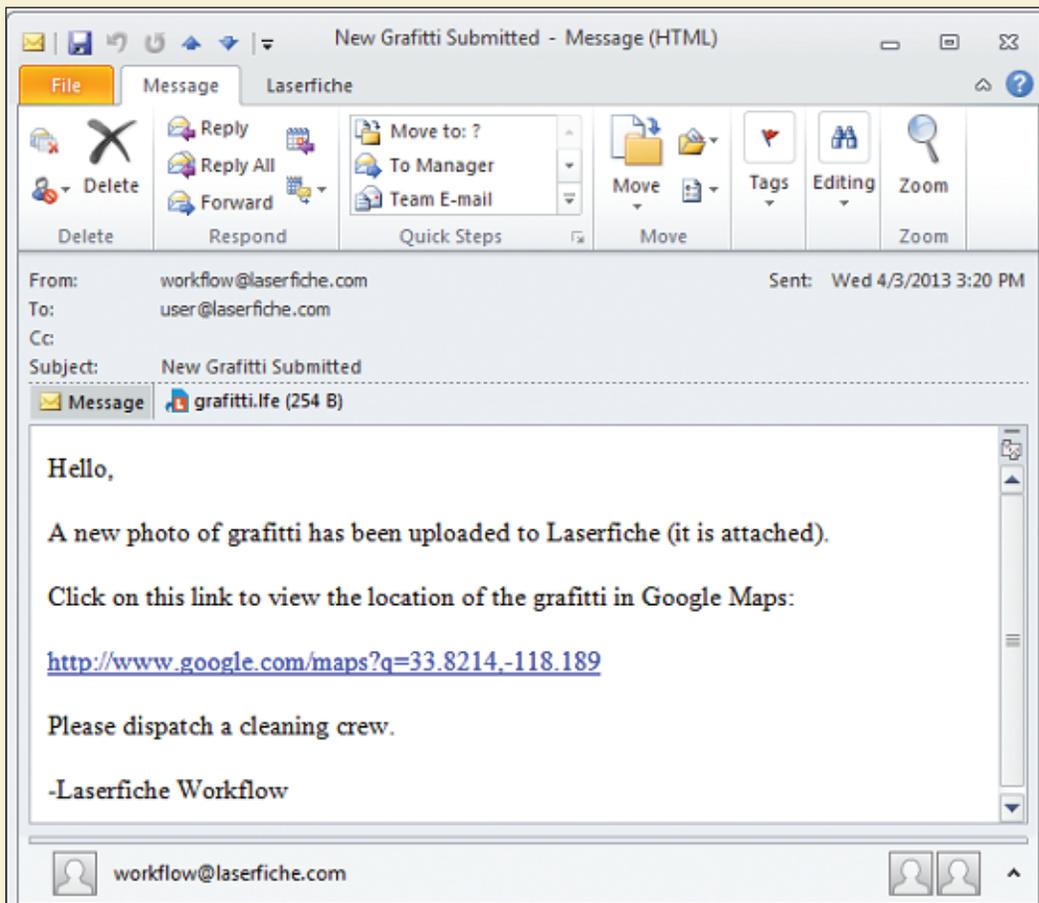


This photo is sent directly into the Laserfiche repository.



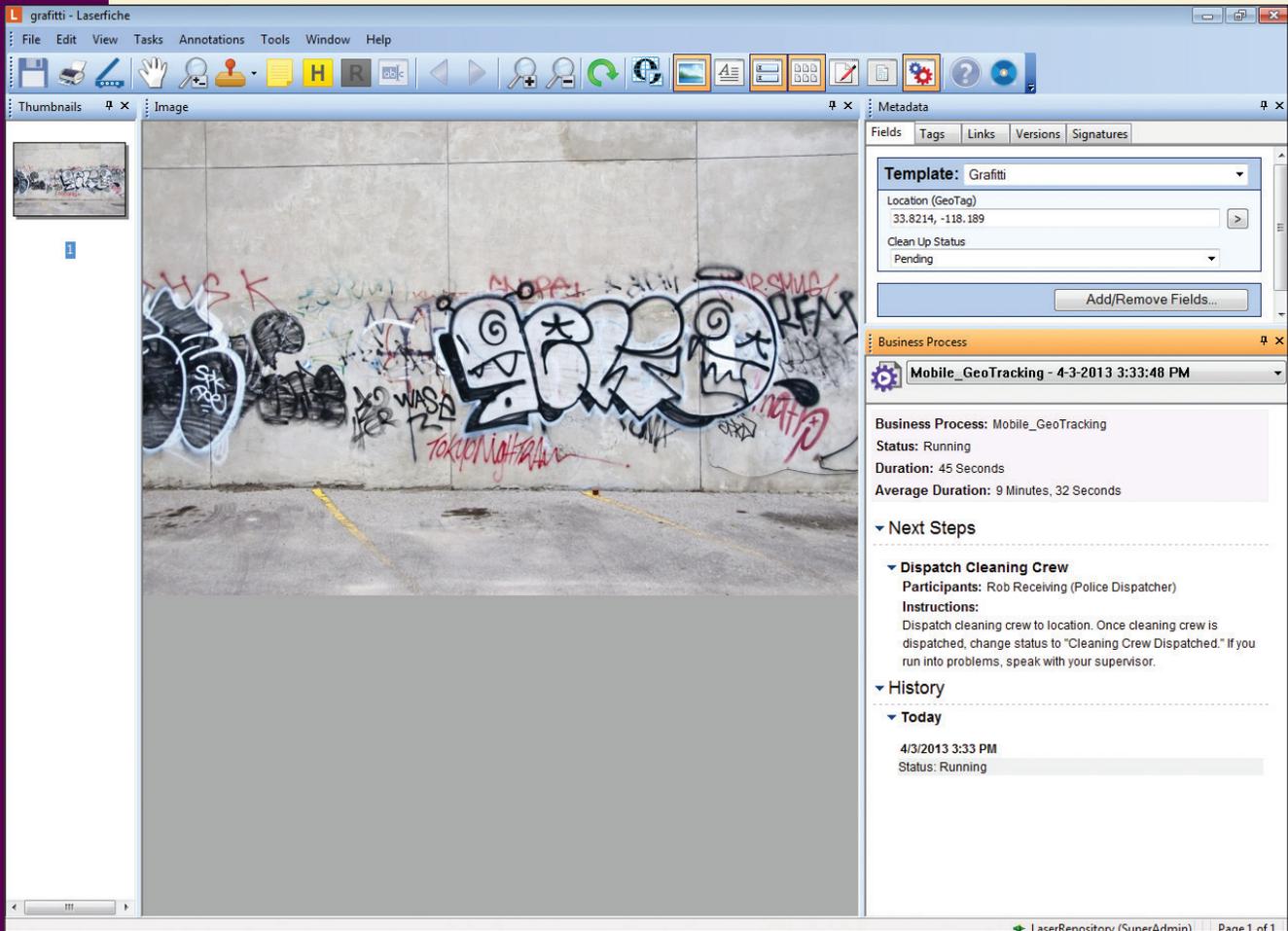


An email is automatically generated and sent to the public services department. This email notifies the department that a new photo of graffiti has been uploaded and provides a link to Google Maps of the location of the graffiti, as well as the attached photo.





The public services employee opens the image from the link and is able to see directions on what to do by looking at the image's business process details.

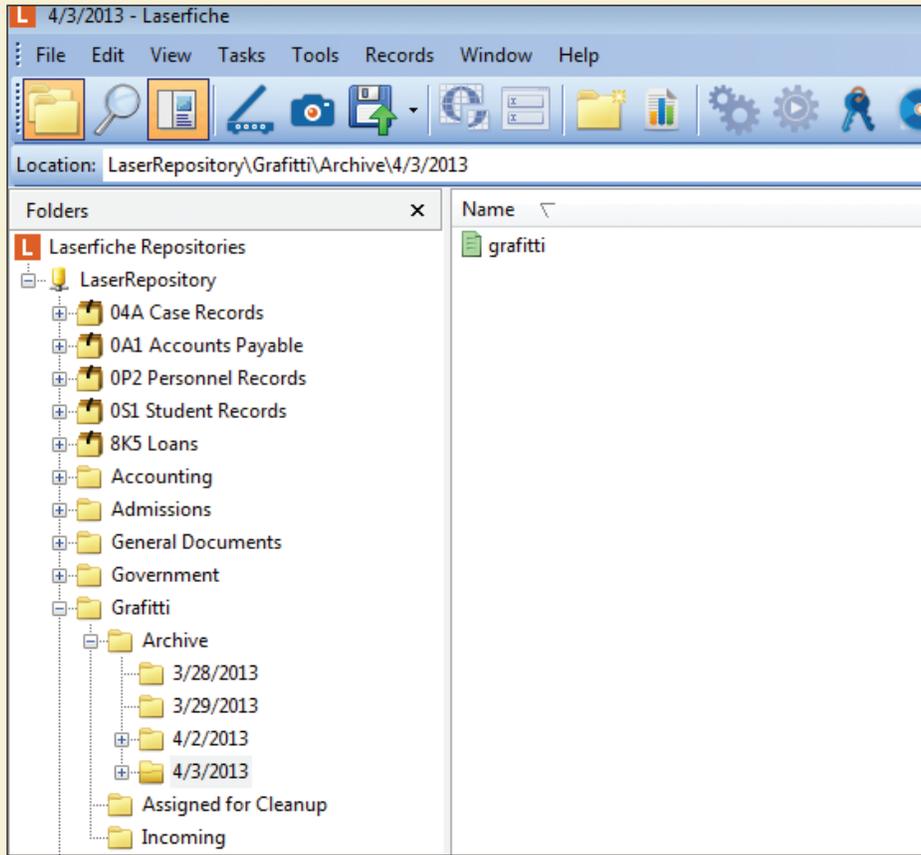


The employee dispatches the cleaning crew to the location and then updates the value of the "Clean Up Status" field to Cleaning Crew Dispatched.

| |
|---|
| Template: Grafitti |
| Location (Geo Tag) 33.8214,-118.189 |
| Clean Up Status Cleaning Crew Dispatched |
| <input type="button" value="Add/Remove Fields..."/> |



Once the cleaning crew has cleaned up the graffiti, they report back to the dispatcher. The employee then opens the image metadata from the image which has now been moved to “Assigned for Cleanup” and updates the status to “Cleaned Up.” The image is then moved to a subfolder in the “Archive” folder for archival.





The business process details have been updated so that the whole history of the document is visible.

Business Process

 **Mobile_GeoTracking - 4-3-2013 3:33:48 PM [completed]** ▼

Business Process: Mobile_GeoTracking
Status: Completed
Duration: 21 Minutes, 24 Seconds
Average Duration: 9 Minutes, 32 Seconds

▼ **History**

▼ **Today**

4/3/2013 3:55 PM
Status changed from 'Running' to 'Completed'

4/3/2013 3:55 PM
Step: Verify that Graffiti is Cleaned Up
Duration: 18 Minutes, 12 Seconds (Avg: 18 Minutes, 12 Seconds)
Resolution: Graffiti has been cleaned up on 4/3/2013 3:55:12 PM.

4/3/2013 3:37 PM
Step: Dispatch Cleaning Crew
Duration: 3 Minutes, 10 Seconds (Avg: 3 Minutes, 10 Seconds)
Resolution: Cleaning crew has been dispatched on 4/3/2013 3:37:00 PM by Rob Receiving.

4/3/2013 3:33 PM
Status: Running



WHAT IS HAPPENING BEHIND THE SCENES

Laserfiche Mobile allows for geotags to be appended to all photos sent to the Laserfiche repository. This can be configured in the Laserfiche Mobile configuration page:

Configuration

Connection

Connection

App

General

Help

About

Connection

Repositories

| Default | Server Name | Repository Name | SSL (LFS) |
|----------------------------------|--------------------------------|-----------------|--------------------------|
| <input checked="" type="radio"/> | v-dev-2k2r2-5.laserfiche.com | Elysium | <input type="checkbox"/> |
| <input type="radio"/> | v-qa-release90.laserfiche.com | release90 | <input type="checkbox"/> |
| <input type="radio"/> | v-qa-autoupdate.laserfiche.com | AutoUpdate | <input type="checkbox"/> |
| <input type="radio"/> | v-dev-2k2r2-5.laserfiche.com | MobileTest | <input type="checkbox"/> |

New connection:

Authentication

For repository:

Disable Remember Me

Laserfiche accounts: Allowed Denied

Windows accounts: Allowed Denied

Users listed below: Allowed Denied

Geotag

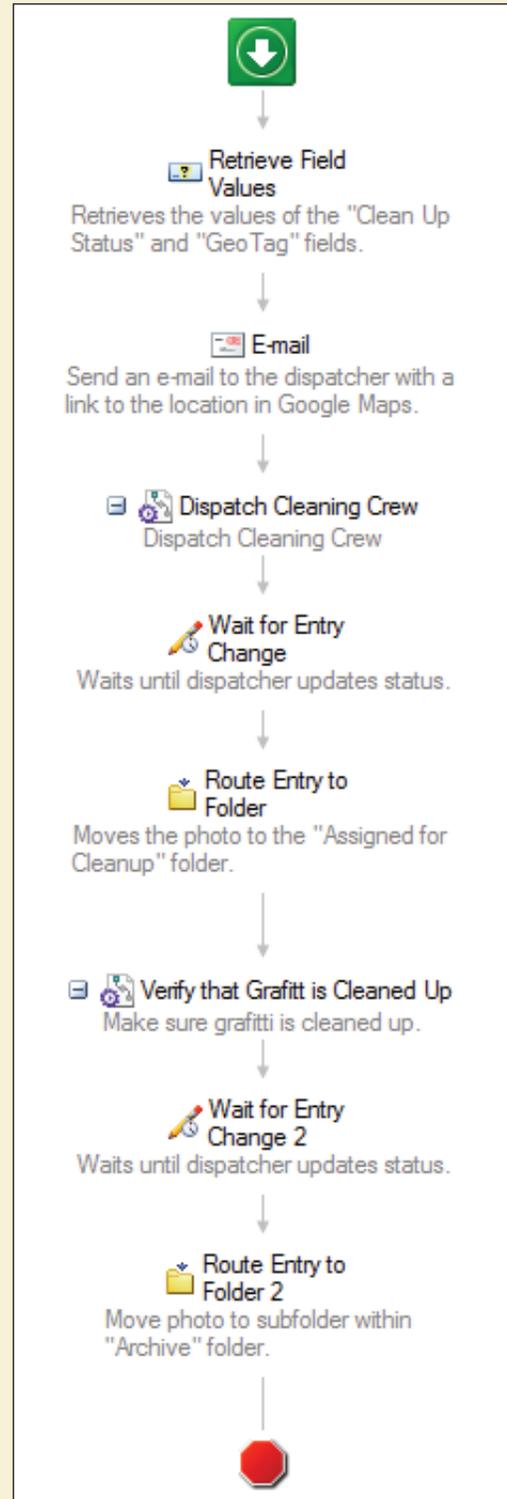
For repository:

Add a field for geotag information



Once this option is enabled, every photo sent to the repository will have the geotag inserted into a specified field. In order to ensure veracity of the geographic data, this field will also be set as read-only so that the value cannot be changed by the person taking the photo.

Laserfiche Workflow then launches a business process on the new photo. Here is a copy of the business process:





Here is the configuration for one of the business process steps:

Properties ▼ 🔍 ✕

Business Process Step ?

Activity Name

Business Process Step

Activity Description

Dispatch Cleaning Crew

Step Name

Use the activity name

Use this name:

>

Due Date

Specify a reporting due date for this step

Step Instructions

Instructions:

Dispatch cleaning crew to location. Once cleaning crew is dispatched, change status to "Cleaning Crew Dispatched." If you run into problems, speak with your supervisor. >

Resolution:

Cleaning crew has been dispatched on %(Date Time) by %(WaitforEntryChange_User Name). >

Participants

[Hide Details](#)

Police Dispatcher ✕

Trustee: Rob Receiving

[Manage Roles...](#)



In order to construct the Google Maps URL, the coordinates entered into the Location (Geo Tag) field must be converted into a token with the Retrieve Field Values activity.

Properties

Retrieve Field Values

Activity Name

Retrieve Field Values

Activity Description

Retrieves the values of the "Clean Up Status" and "GeoTag" fields.

Fields

Clean Up Status
Location (Geo Tag)

Field Value Source

Starting Entry

Other Entry [Select...](#)

Activity: For Each Reviewer

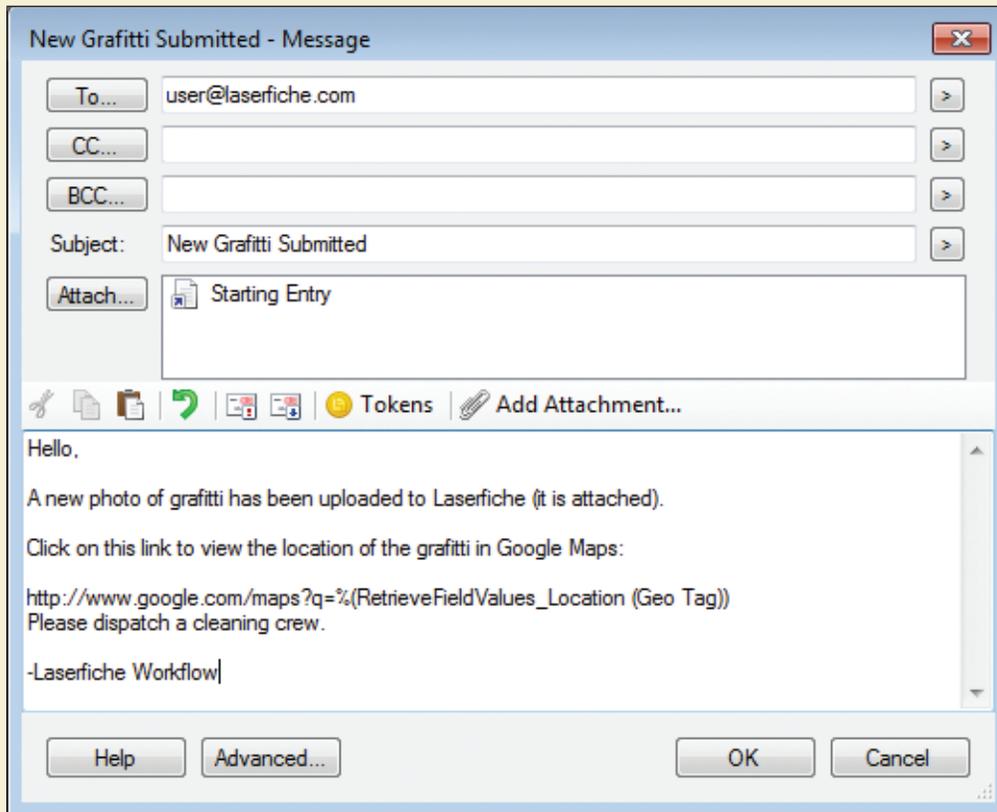
Entry: Current Entry



This token is used to construct the URL:

[http://www.google.com/maps?q=%\(RetrieveFieldValues_Location \(Geo Tag\)\)](http://www.google.com/maps?q=%(RetrieveFieldValues_Location (Geo Tag)))

This Google Maps URL is used when configuring the E-Mail activity.



BENEFITS OF LASERFICHE MOBILE

Implementing Laserfiche Mobile at the city has resulted in the following benefits:

- Reporting graffiti is quicker and easier, so graffiti can be cleaned up faster.
- To analyze which areas had the most graffiti, geotag data is exported into an external database that uses a “geographic” field type so that SQL reports can be run on the location information. This knowledge allows the police department to station more officers at the site to locate suspected perpetrators.
- App-side compression allows multiple photos to be sent to Laserfiche quickly and efficiently.



MOBILE SECURITY

Laserfiche Mobile provides on-the-go access to the Laserfiche repository. Yet, with mobility and convenience come risks of the mobile device being stolen and confidential data falling into the wrong hands. Here are some best practices for configuring security within Laserfiche Mobile to make sure only authorized individuals have access to the documents stored in the Laserfiche repository.



A project manager at Laserfiche walks through best practices for setting up security in Laserfiche Mobile for the iPhone or iPad

LASERFICHE MOBILE SECURITY

Laserfiche Mobile security is offered on two levels: user and administrator.

When a user logs out of Laserfiche Mobile, all data, including any open electronic documents, is immediately cleared from the device. In order to resume working, the user must log back into Laserfiche Mobile and download the electronic document again. Company policies should be set to remind users to log out when they are finished interacting with Laserfiche Mobile.

An extra layer of security, enforced by the server, is also available in Laserfiche Mobile. When configured by an administrator, these features (enabling automatic log-out and disabling automatic log-in and export) will automatically apply to all users. All these options are configured on the Laserfiche Mobile Configuration page.

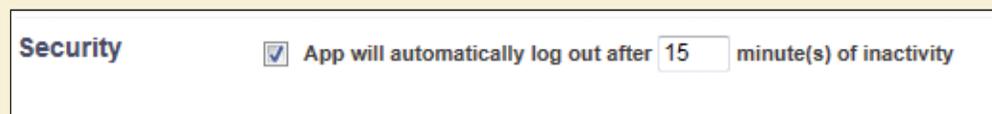
It is best practice to pair these security settings with the security features offered by the iPhone and iPad such as the “Auto-Lock” and “Passcode Lock” features (configured in the device’s Settings).



AUTOMATIC LOG-OUT

It is possible to configure Laserfiche Mobile to log out automatically after a certain period of inactivity. On automatic log-out, the app will close the current view and return to the login page. This not only removes all documents from the hard drive and memory, but also no longer shows the document or folder that the user was last viewing. In addition, all of the open documents (including electronic documents) will be wiped from the hard drive anytime the user minimizes the Laserfiche Mobile app.

These settings can be applied in the “App” section on the Laserfiche Mobile Configuration page.





Enabling the automatic log-out option prevents unauthorized individuals from picking up an abandoned iPad or iPhone and being able to view anything stored in Laserfiche without first logging into Laserfiche Mobile. As noted above, if an administrator chooses not to enable this option, the device can still be cleaned out by logging out.

AUTOMATIC LOG-IN

Laserfiche Mobile comes with the option to disable automatic log-in. This forces the user to type in the user name and password each time the Laserfiche Mobile app is opened.

Authentication For repository:

Disable Remember Me

Laserfiche accounts: **Allowed** **Denied**

Windows accounts: **Allowed** **Denied**

Users listed below: **Allowed** **Denied**

Even though this may be less convenient for the user, disabling this function prevents outside users from just picking up the iPad or iPhone and having immediate access to the Laserfiche repositories. It is recommended to disable automatic log-in when using automatic log-out, though it can also be used independently. This can be done in the “Connection” section of the Laserfiche Mobile Configuration page.

DISABLING EXPORT

When an electronic document is exported from Laserfiche Mobile to another app, that new app takes control of the document and Laserfiche is no longer involved. In certain high security situations, exporting documents should be avoided. The “Disable export” feature in Laserfiche Mobile allows users to view electronic documents in the embedded Laserfiche Mobile document viewer, but prevents them from exporting the document and sending it to anyone else outside of Laserfiche. This option is configured in the “App” section of the Laserfiche Mobile Configuration page.

Export **Disable exporting to other apps on mobile devices**



Note that disabling export is separate from taking away the user's Export feature right. Even with this setting selected, users will still be able to take screenshots of the repository and open documents.

LIMIT USER ACCESS

Enabling automatic log-out and disabling automatic log-in and export affects all Laserfiche Mobile users within an organization. Laserfiche Mobile also allows the administrator to prevent certain users from accessing the repository with Laserfiche Mobile at all. It is possible, for example, to block the administrators group or other high-powered groups from accessing the repository with Laserfiche Mobile. Like the similar feature in Laserfiche Web Access, this prevents a malicious user from forcefully gaining access as a power user over the internet.

This option is configured in the "Connection" section of the Laserfiche Mobile Configuration page.

Authentication For repository:

Disable Remember Me

Laserfiche accounts: Allowed Denied

Windows accounts: Allowed Denied

Users listed below: Allowed Denied

| | |
|---|--|
| <input type="text" value="Admin user group"/> | <input style="background-color: #e0f0ff; border: 1px solid #0070c0;" type="button" value="+"/> |
| Admin | |



STAY INVOLVED ON THE GO

Laserfiche Mobile provides on-the-go access to the Laserfiche repository. Managers are accountable for their employees and departments, and it is important for a manager to be aware or involved in the department's daily work, even when out of the office. Here is how Laserfiche Mobile keeps managers in the loop by allowing them to participate in business processes and view business process history directly from their iPhone or iPad.



Managers: participate in business processes and view business process reports directly from your iPhone or iPad with Laserfiche Mobile.

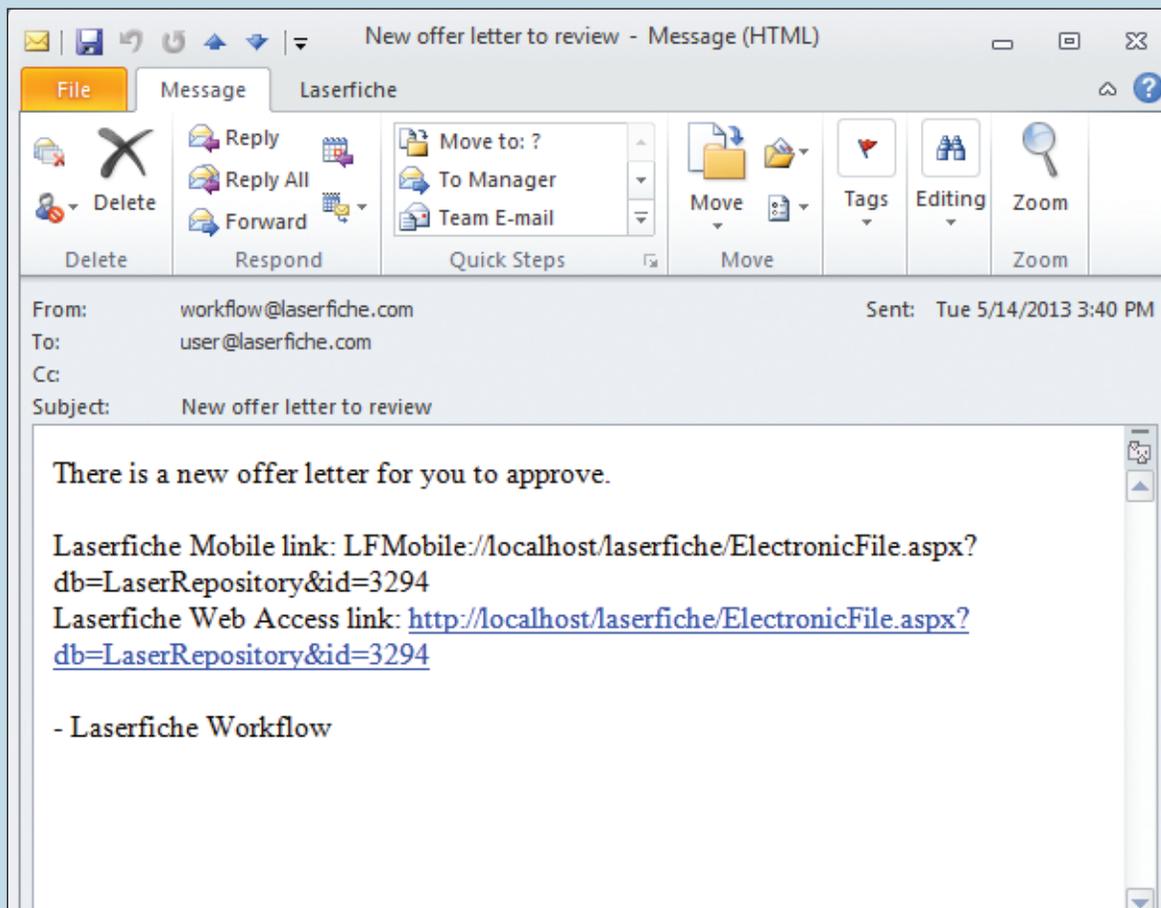
SCENARIO

Mindy is the director of the human resources department in a large organization. As part of her job, she frequently travels between the different company locations around the country. While out of the office, Mindy needs to stay on top of everything going on in the HR department including recruiting, new employee onboarding, benefits enrollment and employee training. She frequently has to field questions from the CEO or other department heads about the status of certain candidates in the recruiting process. Laserfiche Mobile allows her to do all of that, no matter where she is located.

PARTICIPATING IN BUSINESS PROCESSES

Laserfiche Mobile allows Mindy to participate in business processes by updating metadata and viewing business process instructions. For example, as part of the HR Onboarding business process, an offer letter is generated and sent to a job candidate. Before this letter is sent to the candidate, it must be approved by the HR director. Since job offers are time-sensitive, Mindy must review the offer letter as soon as possible.

Mindy is notified that there is an offer letter to review with an email generated by Laserfiche Workflow. This email contains a Mobile URL to the offer letter document in Laserfiche. More information about Mobile URLs can be found in the online Laserfiche Mobile Help Files.





Since Mindy is out of the office, she can click on the Laserfiche Mobile link to open the offer letter on her iPad. She can then easily see the history of the offer letter as well as instructions on how to approve/reject it by viewing the document's business process details:

The screenshot shows an iPad interface with a status bar at the top displaying 'iPad', signal strength, '3:08 PM', and '28%' battery. The main content is divided into a left sidebar and a main document view.

Left Sidebar:

- Top: 'Business Process' with a right-pointing arrow.
- Document icon: 'HR-Offer Letter -SEv2 - 5-7-2...' with a refresh icon.
- Business Process details:
 - Business Process:** HR-Offer Letter -SEv2 - 5-7-2013 11:10:38 AM
 - Duration:** 3 hours 57 minutes
 - Status:** Running
 - Average Duration:** 4 seconds
- Next Step section:
 - ▼ **Review Offer Letter**
 - Participant:** LASERFICHE \JOANNA.SLUSARZ (HR Director)
 - Instructions:** Review the offer letter to make sure it is acceptable. Signify your acceptance by adding the "HR Approval" field and selecting either "Approved" or "Rejected".
- History section:
 - ▼ **Today**
 - 11:10 AM**
 - Status changed to 'Running'
- Bottom sidebar icons: question mark, gear, and home.

Main Document View:

- Header: 'Sales, Sally' and 'Sally Sales - Job Offer'.
- Document content:
 - Name:** Sally Sales
 - Date:** 4/16/2013
 - Ref:** Sales Account Manager
 - Dear Sally Sales ;
 - I am writing to confirm my offer of a position at Laserfiche as a Sales Account Manager. The hours will be 40 per week 8 hours daily. This position is offered subject to satisfactory reference and pre-employment checks and completion of the three-month probationary period during which time your performance will be reviewed.
 - This is a permanent position and you will therefore be entitled to all staff benefits. Your starting date will be 5/7/2013. Your salary will be paid directly into your bank account on the first and third week of each month. You will be entitled to 10 days holiday per year pro-rata, plus Bank Holidays. The Holiday year runs from Jan 1st - Dec 31st.
 - Please signify your acceptance of the offer by signing and returning to me the enclosed copy of this letter no later than 4/23/2013.
 - We are all looking forward to working with you and hope you will soon feel part of the team. If you have any questions, please contact me.
 - I hereby accept employment on the conditions set forth in this letter.
 - Signature of Candidate
 - 4/16/2013
 - Date
- Bottom navigation: 'Sales, Sally' and 'Sally Sales - Job Offer' with text, PDF, and share icons.

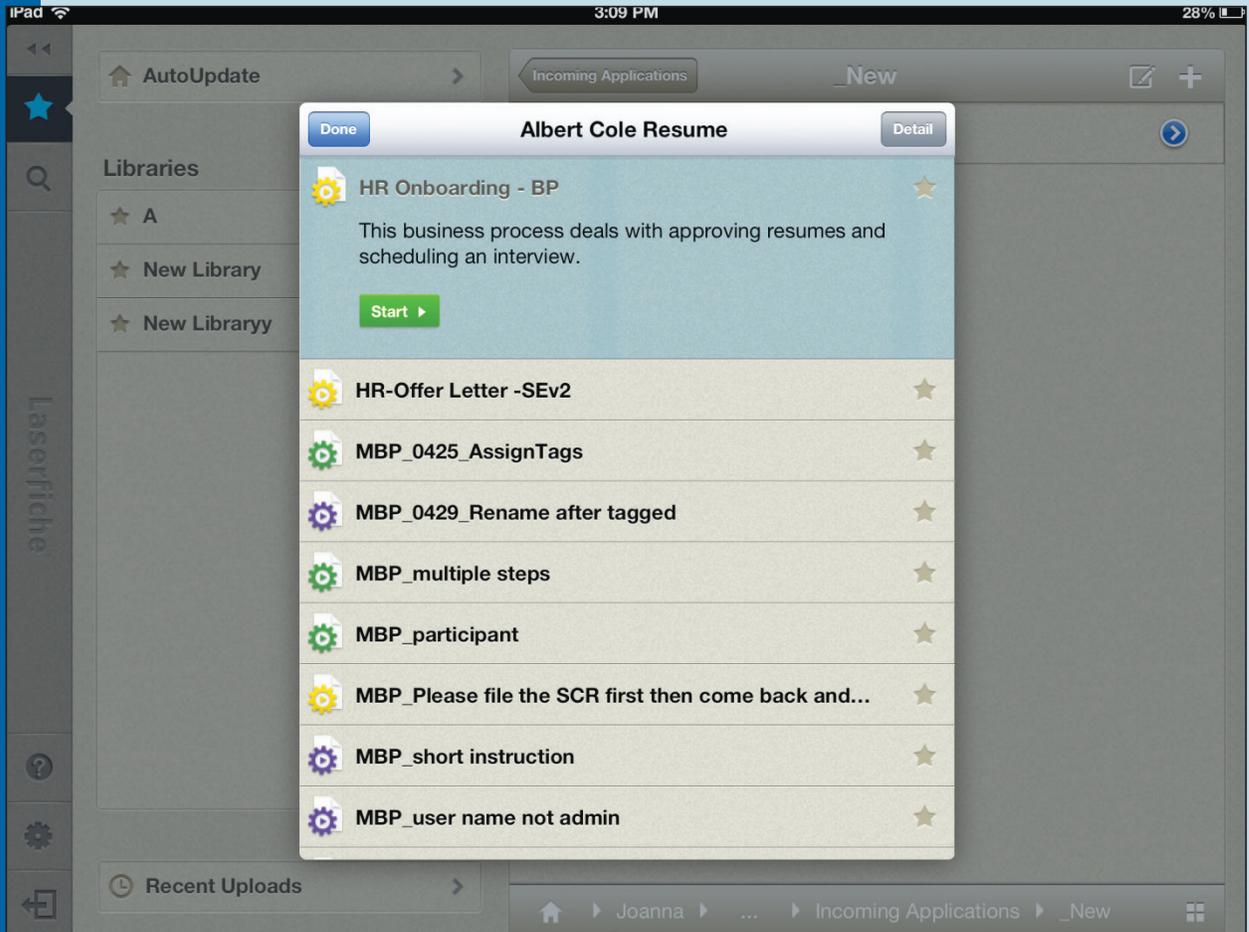


Mindy can quickly change the "HR Approval" field to "Approved" or "Rejected" once she is finished with the review.

The screenshot shows an iPad interface for a job offer. On the left, a 'Fields' sidebar contains several input fields: 'Email' (sally.sales@laserfiche.com), 'HouseAddress' (123 W. Bank St.), 'City_Name' (Long Beach), 'StateName' (California), 'HRApproval' (Pending), 'DepartmentHeadApproval' (empty), 'InterviewDate' (May 1, 2013), and 'InterviewTime' (11:00 AM). The main area displays a job offer letter for Sally Sales, dated 4/16/2013, for a Sales Account Manager position at Laserfiche. A dropdown menu is open over the 'HRApproval' field, showing three options: 'Approved', 'Rejected', and 'Pending' (which has a blue checkmark). The Laserfiche logo 'Run Smarter' is visible in the top right of the letter content.



If Mindy needs to launch a Laserfiche business process while out of the office, she can also do it from her iPhone or iPad with Laserfiche Mobile. For example, if Mindy gets a job applicant referral and wants to fast-track the employee onboarding process because she knows the applicant can bypass the initial screening, Mindy can launch the “HR Onboarding – BP” business process directly from her iPad or iPhone.





VIEWING BUSINESS PROCESS REPORTS

Mindy can also view the business process history of any HR document. If the company CEO wants to know which step the executive assistant candidate is at in the hiring process, Mindy can quickly find the candidate's application and view the business process details to see everything that has happened thus far with that application.

The screenshot shows the Laserfiche mobile interface on an iPad. At the top, it displays 'iPad', signal strength, '3:38 PM', and '29%' battery. The 'Business Process' section shows a dropdown menu for 'HR Onboarding - BP - 5-7-20...' and a refresh icon. Below this, it lists: 'Business Process: HR Onboarding - BP - 5-7-2013 3:31:10 PM', 'Duration: 6 minutes 34 seconds', 'Status: Terminated', and 'Average Duration: 1 day 8 hours'. The 'History' section is titled 'Today' and lists three steps: 1. 3:37 PM: Status changed from 'Applicant Information sent to Hiring Manager.' to 'Terminated'. 2. 3:37 PM: Step: Manager Approval, Duration: 58 seconds (Avg: 58 seconds), Resolution: LASERFICHE\JOANNA.SLUSARZ has reviewed the application. 3. 3:36 PM: Status changed from 'Running' to 'Applicant Information sent to Hiring Manager.'. 4. 3:36 PM: Step: Human Resources Approval, Duration: 5 minutes 31 seconds (Avg: 5 minutes 30 seconds), Resolution: Human Resources has screened the Applicant. 5. 3:31 PM: Status changed to 'Running'.

The detailed report for Hector Jameson includes:

Hector Jameson
123 Oak St., Long Beach, CA 90404
562-090-1212
hector@gmail.com

Summary

- Demonstrated achiever with exceptional knowledge of international markets, business practices, and trade regulations.
- Strong marketing and finance background combined with fluency in several languages, including "Advanced Level" U.S. State Department certification in Russian Language-Reading Comprehension.
- Skilled at learning new concepts quickly, working well under pressure, and communicating ideas clearly and effectively.
- Extensive computer training, including knowledge of multiple networking environments and business software packages.
- Enthusiastic and experienced in overseas travel.

Education

| | |
|--|------|
| Masters Degree in Russian & East European Studies <i>Oak Tree University, Washington, D.C.</i> | 2000 |
| B.A. Degree in Foreign Languages <i>Elm College, Coral Gables, FL</i> Concentration in Russian, Spanish, French, & Italian; graduated cum laude with 3.8 G.P.A. | 1998 |
| Completion of Intensive Language Training Program <i>Maple Grove Institute, London, England</i> | 1999 |

Career History & Accomplishments

| | |
|--|------|
| Assistant to the Director of Business Development, Fabrikam, Inc. • Worked directly with Director of Business Development and Director of Strategic planning of this large, publicly-traded provider of home healthcare services. • Researched and wrote marketing, financial, and feasibility reports concerning new business acquisitions and acquisition prospects. • Played key role in preparing a successful \$5 million federal grant proposal to provide the company's home therapy products to rural U.S. areas. • Prepared corporate financial reports and service contracts for the CFO. | 2004 |
| Russian and East European Coordinator, A. Datum Corporation • Held key responsibility in this small import/export company for helping facilitate trade deals with former Soviet Union and Eastern European countries. • Served as interpreter and translator for Vice President in major business negotiations. Reviewed company compliance with all applicable customs laws and procedures. • Initiated multiple overseas joint ventures and served as liaison for foreign customers on business in the U.S. | 2003 |

ADVANTAGES OF LASERFICHE MOBILE

Implementing Laserfiche Mobile in the HR department has resulted in the following benefits:

- HR employees can view business process history on their iPads, allowing them to stay on top of everything that is going on in the department—even when they are out of the office.
- Since the HR director can review and approve offer letters directly from her mobile device, the HR onboarding process is not held up when she's out of the office.
- By launching the HR onboarding business process directly from her iPad, the HR director can quickly jumpstart the hiring of a prospective, qualified employee. This allows her organization to recruit new talent effectively.

QUICKER **BETTER** SAFER Laserfiche Mobile

When solving business process problems, gaining fresh perspective from your peers can be invaluable. That's why Laserfiche encourages its customers to share concrete details (including screenshots) of their solutions to common problems with each other on the Laserfiche Solution Exchange.

This book is a collection of examples of how organizations can incorporate Laserfiche Mobile for the iPhone or iPad into their business processes. With Laserfiche Mobile, productivity is no longer restricted to the cubicle. Employees can review, revise and work on documents, collaborate with others and participate in business processes no matter where they are—all within a secure and compliant environment.

"Laserfiche allows us to manage various documents for virtual real-time retrieval by court employees using the Laserfiche Mobile app on their iPads. This saves us time and money and, in the process, we have become less dependent on paper."

– Patrick Gray, Systems Applications Analyst, Wichita Falls, TX

Laserfiche[®]
Run Smarter[®]