Getting Started with Laserfiche Forms 9.2

White Paper

October 2014

Laserfiche®

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What is Laserfiche Forms?

Laserfiche Forms is a web application that enables you to capture and work with information via web-based forms.

In Laserfiche Forms, forms are created within business processes that dictate how the collected information is routed and worked with.

In general terms, a business process is a collection of activities, events, and decisions that produces a service or product for an organization.

> **Example:** In many organizations, employees must submit expense reports to be reimbursed for purchases they made while working for the company. Submitting an expense report is the first step in a larger process in which that information is routed to one or more managers for approval before the process ends with the worker's request being approved or denied.

In Laserfiche Forms, you can create an electronic version of this and other form-based business processes.

Laserfiche Forms allows you to:

- Capture and work with information in web-based forms
- Automate basic business processes with a BPMN-based Process Modeler
- Use public forms to extend participation to users beyond your organization
- Integrate with Workflow for processing outside of Laserfiche Forms
- Send email notifications to participants
- Save submitted forms to your Laserfiche repository

Using Laserfiche Forms

When you log in to Laserfiche Forms, you'll see the Inbox, where you can quickly and efficiently complete and review your tasks. From here you can also navigate to the pages that let you start a business process and submit a form. Through the navigation choices on the title bar, you can access the help file, your account settings, and log out. Administrators will have options to see metrics and reports, configure security settings, and manage business processes.
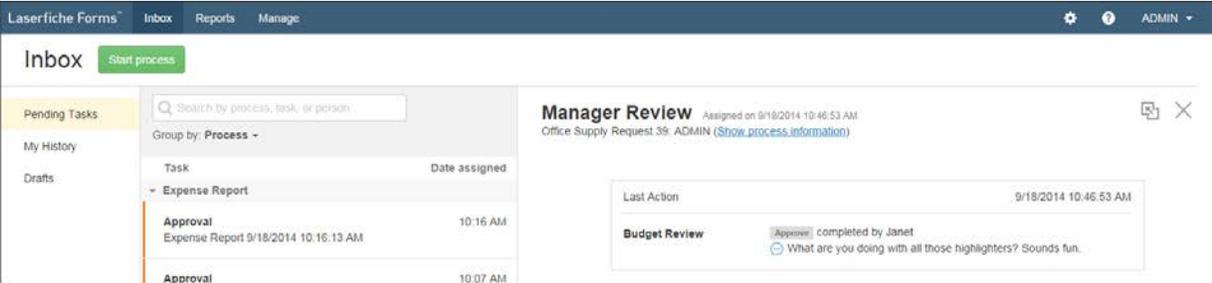

Starting a Process and Submitting a Form

Click the **Start Processes** button, to see a list of all of the processes that are available for you to start. For each process, you'll see its name and a brief description. Clicking the star to the left of the process adds it to your favorites. You can search for a specific process with the search box at the top of the list.

Most commonly, when you chose to start a process, a form will appear for you to fill out and submit. Submitting the form starts the process. Each time you start a business process, a unique instance of that process is created.

> **Example:** Sarah needs to order a new printer, so she selects the Office Supply Request process from this list. The Office Supply Request form opens for her to fill out. When Sarah submits the order form, an instance of the Product Order business process is created.
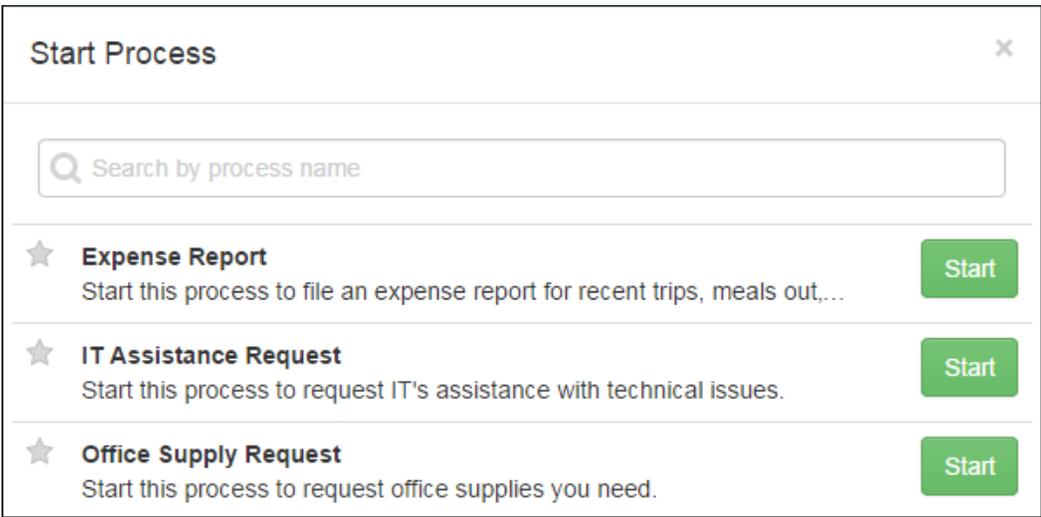
Tasks

You may be assigned tasks in some business processes that will appear in your Forms inbox. When you complete your task, the process will move on to the next stage. The inbox has three sections:

- **Pending Tasks:** View and complete tasks that are waiting on your actions.

- **My History:** Review the status, history, and forms from processes you've participated in.

- **Drafts:** If you start to fill out a form, but need to finish it later, you can save it to the Drafts tab.

Example: You must approve expense reports that members of your department have submitted. After someone submits an expense report, a task will appear for you in the **Pending Tasks** section of your inbox. When you complete the task, the process will move on. If you later need to review the expense report, you can find the process instance in the **My History** tab.

Laserfiche Forms™	Inbox	Reports	Manage

Inbox Start process

	Task	Date assigned
Pending Tasks		
My History	Search by process, task, or person	
Drafts	Group by: **Process**	

Task	Date assigned
▾ **Expense Report**	
Approval Expense Report 9/18/2014 10:16:13 AM	10:16 AM
Approval Expense Report 9/18/2014 10:07:05 AM	10:07 AM
▾ **Office Supply Request**	
Budget Review Office Supply Request 41: ADMIN	10:55 AM

Pending Tasks

To work on a task assigned to you, click it to open it. You can complete the task directly from the form that's shown. If you need more information before making a decision, you can see how previous steps in the process ran by clicking on **Show process information** above the form. Once you've completed a task, the process will appear in your history.

> **Tip:** You can search for and categorize tasks to easily find the ones you want to work from. Use the search box at the top of the page to search for specific tasks. The drop-down menu lets you categorize your tasks by date the task was assigned to you, the task's priority (urgent: red, high: orange, medium: yellow), who started the process, or the process's name.

My History

The My History tab lets you review processes you've interacted with whether you started the process or completed a task in the process.

> **Example:** You submitted a travel request last week, but you haven't heard anything about its status. You can find your Travel Request process in the **My History** tab. The **Process status** column tells you its current status. Clicking the process shows you the step the process is currently at and who that step is assigned to. You can also see the process's summary and action history. In the action history, click any blue underlined text to see the related form.

Click a process instance to see more information about it. To see the forms from various stages in the process, click the blue process step names in the Action History.

Just like in the Pending Tasks tab, you can search and sort process instances to quickly find the one you need.

Drafts

If you started filling out a form, but had to save it before you could finish, it will appear in the Drafts section of your inbox. Select a draft in this tab to continue working on it.
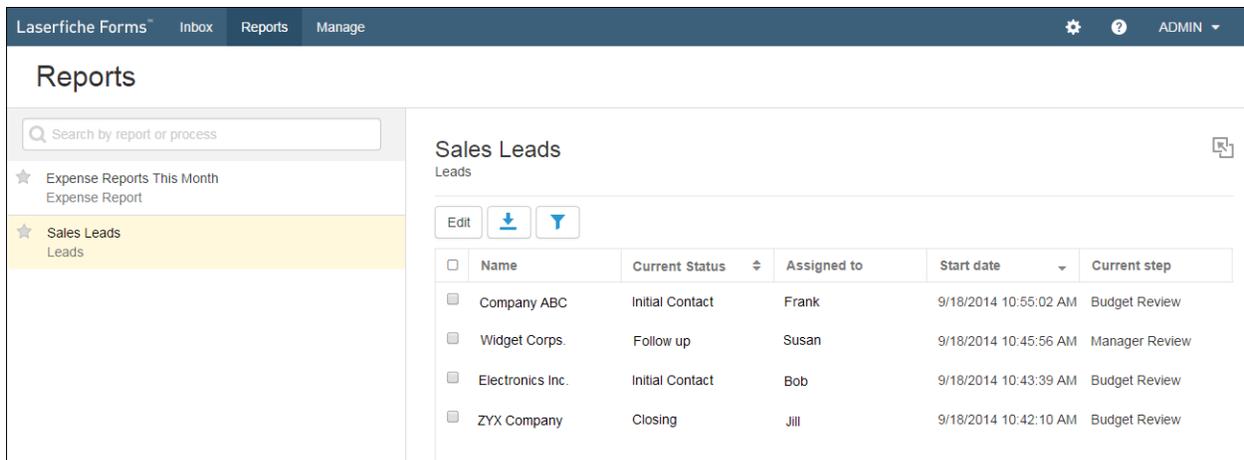
Reports

Process Admins for a business process can create and assign reports to users, enabling them to see instance results that they would otherwise not have access to.

Example: Janet manages the Sales team and needs to know which sales person is assigned to each active sales lead. Her company's Laserfiche Forms administrator created a report that will show her that data at a glance.
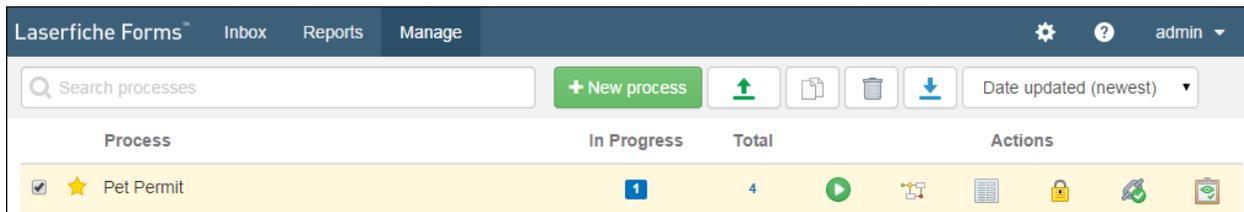

Managing Business Processes

On the Manage page, you can create and administer business processes.

In the middle of the screen, you'll see a list of all business processes your security roles allow you to see.

Note: Depending on your access rights and system security role, some of these actions may be hidden. For example, to create and import business processes, you must be assigned the Creator role on the System Security page. To administer business processes, you must be assigned the Process Admin role for that specific business process. To import, copy, download, or delete the selected business process, use

the buttons at the top of the list. Downloaded processes are saved in XML format.

The process list on the Manage page has several columns:

Active: The number of instances of the process that are still in progress. Click the number for a particular business process to go to its Results page.

Total: The total number of instances of the process, including in progress and completed instances. Click the number for a particular business process to go to its Results page.

Actions: The buttons in this section allow you to configure each aspect of the business process.

- **Start:** Starts the process.

- **Process Modeler:** Opens the Process Modeler, where you can map out and automate the business process.

- **Forms:** Opens the Form Designer, where you can create the forms the business process will use.

- **Access Rights:** Opens the Access Rights page, where you can grant other users access to the process and, if you have Forms Portal, determine whether the process is publicly available.

- **Publish:** Opens the Publish page, where you can make the process available from the Start page and through URL links.

- **Results:** Opens the Results page, where you can see the data from each instance of the process and create reports.

Creating a Business Process

In addition to participating in business processes by submitting forms or performing tasks, you can also create your own business processes in Laserfiche Forms. All users with access to the Manage page can create and administer their own business processes.

1. On the **Manage** page, click **New process**.

2. Under **Available Template**, select the type of business process you are creating. The default process model for your business process will be based on this selection.

   - **Form Submission:** The business process is created with a pre-configured process model that captures form submission information and then ends. Select this type if you only want to capture information and do not want to have Laserfiche Forms process it. When this type is selected, a form will be created automatically for you to customize, and no additional configuration of the process model is necessary.

   - **Form Approval:** The business process is created with a pre-configured process model that begins with a form submission and has an approval step. This type is appropriate when creating simple approval processes. When this type is selected, a form will be created automatically for you to customize.

   - **Blank Process Model:** The business process is created with a blank process model. This type is best for experienced users who will create complex processes.

3. Name the business process and give it a description. The description will appear in the **Start Process** dialog box. A good description can help users quickly find the right process.

4. When you are finished, click **Create Process**.

Once you've created a business process, you'll need to create its process model, create any necessary forms, set access rights, and publish it.

Creating a Process Model

Once you've created a business process, you'll need to create a process model—the graphical representation of the process which uses BPMN objects like events, activities, and decisions—so that Laserfiche Forms knows how to run the process.

1. If you just created a process, the Process Modeler will open automatically. If you created a process a while ago, select the process from the Manage page.

2. Ensure your process has a start event. If one is not present on the canvas, drag a Start Event onto the canvas for a manual start or drag a Message Start Event onto the canvas if the process will begin when a form is submitted.

3. Drag an object from the palette to add it to the canvas. Connect one object to another using Sequence Flows.

4. Repeat step two until your business process is fully represented on the canvas with objects correctly connected to each other.

5. Configure events, activities, and gateways used in your process by double-clicking them and opening their settings. Learn more.

6. When you are finished configuring your business process, click the green validate check mark on the Process Modeler toolbar to check for any errors in your process.

7. Resolve any errors, and click **Save** to save the business process.

Creating a Form

Once you've created a business process, you'll want to create a form to capture the information needed for that process.

1. In the Process Modeler, in the configuration pane for a message event or user task, click **Edit** next to Starting Form.

2. Drag fields on to your form and edit their settings. Learn more.

3. You can further configure your form using the options in the top menu:

    - **Field Rules** lets you define rules that show and hide fields based on specific conditions.

    - **Lookup Rules** lets you lookup values in a database to auto-suggest and auto-populate values when users fill out the form.

    - **Themes** lets you customize the form's appearance using predefined or customized templates.

    - **Custom CSS** and **JavaScript** lets you customize the layout and behavior of fields using CSS and JavaScript.

4. After you've created the form, return to the process modeler to ensure the activities and events in your process are configured to use the form.
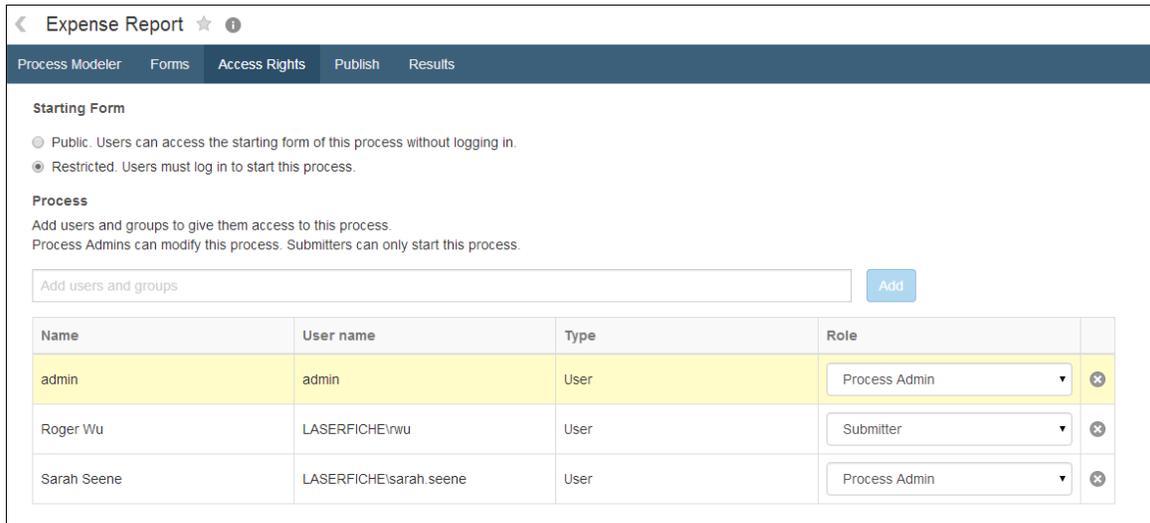
> **Tip:** You can have multiple forms in a single process. In many approval processes, you'll want to create a form for users to submit at the Message Start Event and then another form for managers to approve in a User Task event. You can display information from the submitted form on the approval form, making it easy for managers to make informed decisions. To show this information on the approval form, drag variables from the submitted form onto the approval form in the Form Designer.

Assigning Access Rights

Once you've created a business process and built its process model and forms, you'll need to set access rights on the business process. Setting access rights allows you to determine the users that will be able to start this process and those that will be able to administer it.

Users can have one of the following rules for a business process:

- The **Process Admin** role allows users to modify the business process, see its results, and create reports for it. Process Admins also have the Submitter rights below.

- The **Submitter** role allows users to start a process, either by submitting a form or by starting a process manually. In the My History tab of the inbox, submitters can also see information about processes they've participated in.

To add users or groups

1. In the text box under **Access Rights**, type the name of each user or group you want to add to the business process. As you type a name, a drop-down list will appear with suggested names. Click the desired name. You may add multiple users and groups to a process.

   > **Tip:** We recommend applying security at the group level whenever possible. Group-based security is easier to apply security, is faster to update, and ensures consistent access based on your organization's structure.

2. When you have finished selecting users and groups, click **Add**.

3. In the table below, select a role for each user or group you added from the **Role** drop-down list. Your changes will be automatically saved.

Publishing and More Process Settings

On the Publish page, you can publish or hide the process, enable Save to Laserfiche, add a FAQ pane to the starting form, and find out how to share the process.

Publish a business process

Click **Publish** to publish the process so that users with the Submitter role can see, start, and participate in the process. Only Process Admins can see, start processes, and participate in hidden processes.

Configure Save to Laserfiche

When Save to Laserfiche is enabled, a copy of each form submitted as part of the process will be saved as a TIFF or PDF to the Laserfiche repository specified on the Forms Configuration page.

> **Tip:** We recommend using the Save to Repository service task instead of Save to Laserfiche whenever possible, because the service task gives you more flexibility to define exactly where and how forms are saved.

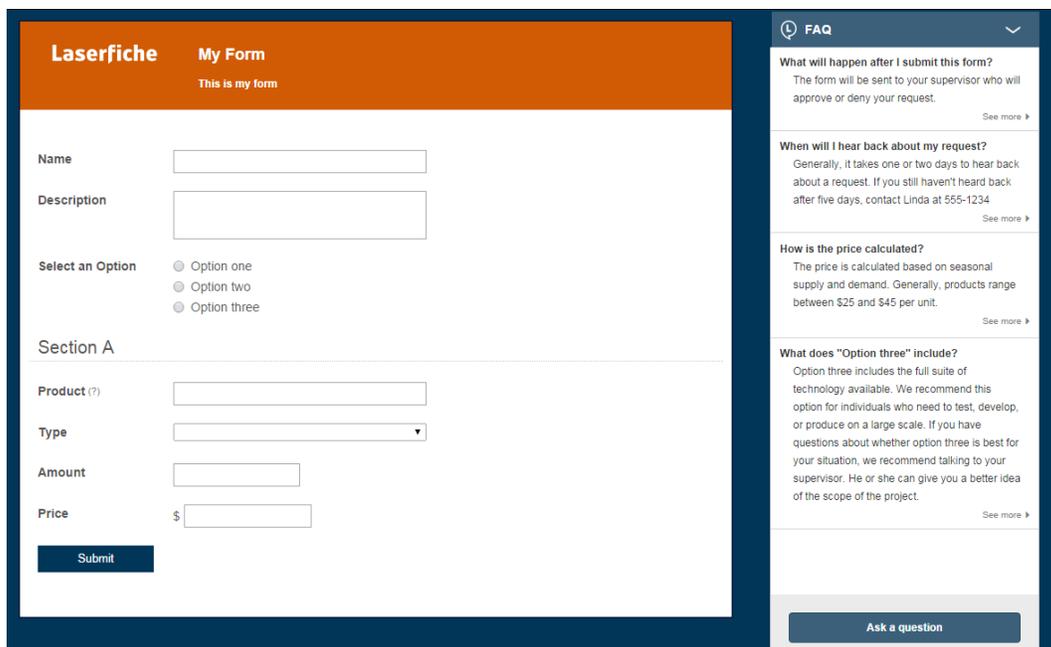### Frequently Asked Questions

> **Note:** This feature requires Laserfiche Social BPM Preview and is only available if you've configured a Laserfiche Social BPM service on the Forms Configuration page. Learn more.

You can choose to display frequently asked questions next to the form. The frequently asked questions will appear in a collapsible side pane and display questions and answers associated with a specific group in Laserfiche Social BPM. Displaying FAQ in this way can serve as an invaluable tool for answering the most common questions about a form.

To enable the Frequently Asked Questions pane

1. Under Frequently Asked Questions, select **If this process begins with a form submission, include an FAQ on that form**.

2. Click **Choose group**.

3. In the **Choose Group** dialog box, select a group whose questions and answers you want to display and click **OK**.

> **Tip:** To determine which groups appear here, who can view the FAQ, and which questions will appear, see the [Laserfiche Social BPM help](#).

4. The questions and answers associated with this group in Laserfiche Social BPM will be displayed in the pane on the form that starts the process.

Sharing a Process

Sharing a process gives users flexibility in to start a process from a variety of different places. For processes that start with a form submission, a URL link to the form is available, along with the code necessary for embedding the form in another website. For processes that must be manually started, URL links go to the process on the Start page.

> **Note:** Processes that start on a schedule cannot be shared.

Edit the link for the process by clicking **Edit**. This allows you to make the URL more descriptive. To easily send the link in an email, click **Email link**.

The code for embedding the starting form of the process into an existing webpage is located at the bottom of the page. You can paste this code directly into the HTML markup of an existing page.

> **Note:** Embedded forms display best when the hosting site is in the same domain as the Forms Server.

Changing Your Account Settings

On the Account page, you can specify the name, email address, and time zone associated with your forms user account.

To access the Account page

1. Log in to Laserfiche Forms and click your name in the upper-right corner.

2. Click **Account**.

   - If you are logged in as a Laserfiche named user, you can specify the **Name** and **Email** for your account.

   - If you are logged in with a Windows or LDAP account, Forms will use the name and email from the Windows/LDAP server. You cannot modify these values.

3. Choose a **Time zone** from the drop-down menu. This time zone will be used to determine the current date and time when you are filling out forms.

4. Under **Signature** is your default signature for any Laserfiche form you sign. Click the edit button in the top-right corner to modify the signature. To apply a typed signature to your forms, click **Type** and enter your name in the top field. Select a signature font from the **Style** drop-down menu.
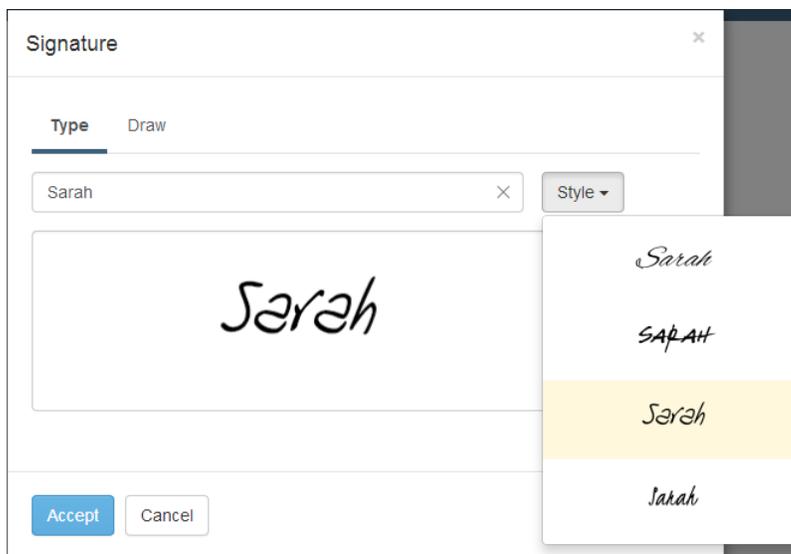

5. To draw your signature with your mouse, click **Draw**. Click and hold as you write your signature in the box. Click the x in the top right to remove your signature and try again.

6. When you are satisfied with your signature, click **Accept**.

7. When you've finished making changes to your user settings, click **Save**.

Further Learning

You now know how to navigate Laserfiche Forms and use it to create and manage your form-based business processes. As you continue using Laserfiche Forms, you may have more specific questions about certain aspects of the product that are beyond the scope of this paper.

The Laserfiche Forms help files can be accessed from any page in Laserfiche Forms by clicking the Help button. The help files contain detailed information about every feature of the program and will help you learn more about specific features or areas of Laserfiche Forms.

In addition to the online help files, the Laserfiche Support Site is a great resource for getting help regardless of the nature of the issue you need help with. On it, you'll find knowledge base articles, white papers, videos, product forums, and more.
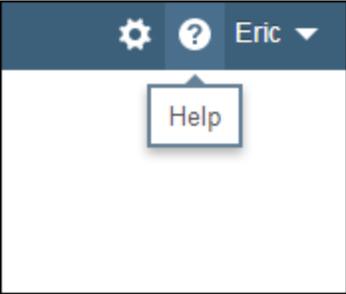
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Description:
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