What's New in Laserfiche Rio, Laserfiche Avante, and Laserfiche Forms 9.2

White Paper

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Laserfiche®

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Laserfiche 9.2 includes many new features and enhancements that allow you to work with your repository more easily and efficiently. These enhancements include more modern visual styles for the Laserfiche Client, Web Access, and Workflow. Laserfiche Forms now features a new inbox page that serves as a home base for users, plus the ability to sign documents. Laserfiche Mobile now supports mobile access to Laserfiche Forms, allowing you to submit forms on the go.

In addition, Laserfiche 9.2 introduces two new products: Laserfiche Directory Server and a preview of Laserfiche Social BPM. Laserfiche Directory Server 9.2 is an updated license management server for Laserfiche Rio that features a new administration website and more flexible options for managing licenses across your organization. Laserfiche Social BPM is a website where users can collaborate, share ideas, and learn. Users can start discussions or ask questions for the entire community, or they can create content within public or private groups. Laserfiche Rio 9.2 includes a preview of Laserfiche Social BPM.

New Features in the Laserfiche Server, Client, Web Access, and Workflow

The Laserfiche 9.2 release features a number of usability enhancements for the Laserfiche Server, Client, Web Access, and Workflow. All these products, including many of their components (such as Laserfiche Scanning and the Laserfiche Office Integration), have been updated to a more modern visual style. In addition, the Laserfiche Client now includes support for new upload tokens, and Web Access now supports opening a PDF directly in a new browser tab.

Laserfiche 9.2 also includes bug fixes and performance and stability enhancements for the Laserfiche Server, Client, Web Access, Workflow, Web Accelerator, Distributed Computing Cluster, and associated components.

New Features in Laserfiche Forms

Laserfiche Forms 9.2 has a new Forms inbox, a page where users can:

- View and complete pending tasks
- Review submitted forms and completed tasks
- Finish forms they've saved as drafts
- Start new processes.

By putting all the relevant process information at the user's fingertips, users can efficiently make informed decisions.

Additionally, Forms 9.2 has a new Signature field type, an option to have forms automatically resize based on browser width (perfect for users accessing forms on their mobile devices), and an option to display a frequently asked questions pane next to forms. This release also includes a number of enhancements to existing features, such as the Section field and the Thank You page.

Inbox

The Forms inbox provides a central location for users to interact with their tasks. Tasks can be searched and organized, making it easy for a user to move through their tasks list. Selecting a task opens the associated form along with relevant information, such as the action history and summary. A My History section lets users browse process instances they've interacted with, either to review the tasks they've completed or to check the status of a process they've started. If a Forms user started to fill out a form but didn't finish, they can find their incomplete form in the Drafts section of the inbox. If users want to start a new process, the Start Process button at the top of the inbox lets them easily select the process they want to start and fill out the forms they need to start the process.

Signature Field

A new Signature field lets users sign forms with a stylus, their finger, a mouse, or by typing with a stylized font. Additionally, users can configure a default signature that they can apply to forms with a single click.

Synchronous Workflows

When starting a workflow from the Workflow Service task, you can now choose to wait for the workflow to finish before the Forms Process continues. This feature is only available with Workflow Servers version 9.1.1 and later.

Section Field Enhancements

You can now make sections of your form read-only using the Section field. All fields between the configured section and the next section can be set to read-only. Additionally, section titles and borders can be hidden. For example, you can now easily make an entire form read-only except for a signature field at the bottom by putting everything except the signature field in a read-only section.

Thank You Page Enhancements

After users submit a form you can choose to display a customized thank you message or redirect them to another website. Forms 9.2 has several new options for configuring your thank you message. You can now use variables in your thank you message to make the content specific to a user or process. You can also use a variable in the redirect URL to dynamically specify the website that appears for the user. If you chose to display a thank you message, you can also include buttons that let the user download or email the submitted form.

Save as Draft Email

You can now customize the text on the email sent to users who save an incomplete form. You can use variables in the email to configure the message specifically for the user who saved the form. Additionally, users that are already logged into Laserfiche Forms don't need to log in again to finish a draft.

Forms Optimized for Small Browser Sizes (e.g., Mobile Devices)

A new option takes advantage of responsive web design to optimize forms for small browsers, such as those found on mobile devices. When this option is enabled, forms will automatically resize to fit the window, making it easy to fill out fields.

Several sections of the Laserfiche Forms site have also been optimized for viewing on smaller screens, such as the inbox, reports, navigation bar, and administrative pages.

Data Sources

Data sources let you retrieve information from your databases (via a Lookup rule) and automatically insert it into forms as users are filling them out. You can now edit and refresh data sources, and your lookup rules will continue to work as long as the necessary tables, columns, stored procedures, or parameters haven't been removed. The Data Sources page has also been redesigned, making it easier to add and edit data sources.

Lookup Rule Behavior

In Forms 9.2, a field will auto-suggest values from a database if a stand-alone Fill statement is configured for the field. Fields can also be conditionally autopopulated if you specify a When + Fill statement. These database lookups can be configured directly in the Form Designer. When you upgrade to 9.2, your lookup rules will continue to behave as before, and the conditions on the Lookup Rules page will be automatically updated to have the Fill statements needed to provide the same auto-suggest behavior as you had in Forms 9.1. To prevent a field from auto-suggesting values, remove the Fill statement from the lookup rule.

> **Note:** Imported Forms processes are not automatically updated and will need additional Fill statements to maintain the prior auto-suggest behavior.

Submission IP Address Captured as Variable

Forms 9.2 captures the IP address of the user who submits, approves, or rejects a form and records their IP address in the History section of results and reports. The submission IP address is available in the Variable menu under Previous Task.

Frequently Asked Questions with the Laserfiche Social BPM Preview

You can display frequently asked questions next to forms that start a process. The questions and answers shown in this collapsible pane are pulled from the new Laserfiche Social BPM preview. This FAQ can serve as an invaluable tool for answering users' most common questions about a form.

Additional Updates

- The main navigation for Laserfiche Forms has been cleaned up and streamlined. User settings can now be found by clicking your user name in the top right and selecting Account.
- You can now easily add logos to your forms from the Themes page in the Forms Designer by dragging and dropping a file, browsing your computer for an image, choosing among previously uploaded images, or providing a URL to an image.
- User synchronization between Forms, Active Directory, and the Laserfiche repository has been improved.
- A warning will appear if you try to use Laserfiche Forms in an unsupported browser.
- Forms 9.2 is fully translated and localized in Arabic (in addition to English, Spanish, Portuguese, and French).

New Features in Laserfiche Mobile

The Laserfiche Mobile 9.2 release introduces the ability to interact with Laserfiche Forms using Laserfiche Mobile. It also features a new backend, an updated user interface, and some new options to make using Laserfiche Mobile more efficient.

Laserfiche Mobile Server

The Laserfiche Mobile Server has replaced the Laserfiche Mobile add-on for Web Access, which allows the Laserfiche Mobile app to work independent from Web Access. This new structure gives users more flexibility when using the app. Users can use the app to do any of the following:

- Work with documents in the repository only
- Interact with forms only (if you have Laserfiche Forms)
- Both work with documents and interact with forms

Forms in Laserfiche Mobile

Laserfiche Mobile can now connect to a Laserfiche Forms Server and access all the Forms business processes on that server. This lets users view the new [Laserfiche Forms 9.2 inbox](#). This inbox displays pending tasks, previously completed forms, and processes that can be started. Users also have the ability to fill out forms to start processes, attach photos from mobile devices to forms, and mark forms as favorites to make them easily accessible in the future. This makes working with forms more accessible and mobile.

Laserfiche Mobile Configuration Page

The Laserfiche Mobile Configuration page has been reorganized to better reflect its current options and allows administrators to configure a Laserfiche Forms server for use with Laserfiche Mobile.

New App Option

The new Upload using Wi-Fi only option controls if new documents will be uploaded using Wi-Fi and cellular data, or Wi-Fi only. By default, this option is disabled. When disabled, the app will use Wi-Fi when available and cellular data when Wi-Fi is not available. If this option is turned on, only Wi-Fi will be used to upload documents (not cellular data).

Thumbnails

You can now tap the page number box in the top left of the Document Viewer to view a document's thumbnails. Tap a thumbnail to quickly jump to its corresponding page.

Updated User Interface

The Android and iOS apps have been updated to make Laserfiche Mobile more efficient and to support the new interaction with Laserfiche Forms. Both have also been optimized for tablets.

Introducing Laserfiche Directory Server

Laserfiche Directory Server 9.2 is an updated license management server for Laserfiche Rio that features a new administration website. In addition, Directory Server includes new features that allow more flexible distribution of named user and application licenses to departments within a larger organization.

Directory Server Web Administration Console

The Directory Server Web Administration Console presents a web application for managing licenses in a Directory Server site. You can use a web browser to view an updated graphical user interface for retrieving a master license from Laserfiche, register and assign named user licenses to Windows Active Directory user accounts or Novell eDirectory user accounts, register application instances, download license files, and more.

Organizations

Laserfiche Directory Server offers additional options for sorting available licenses into different containers for easier management. You can organize registered directory accounts into different Laserfiche Directory Server organizations and use these organizations to reserve blocks of licenses for specific departments. The administration website contains a page for subdividing the total number of licenses defined in a master license among different organizations. When assigning named user licenses to registered directory accounts that are members of an organization, the maximum number of available named user licenses will be limited to the number reserved for that specific organization. Similar limits can be applied to application licenses for an organization.

Security

Directory Server 9.2 introduces more granular security controls for limiting access to portions of a licensing site. At the site-level, you can assign rights to control who can access and view a licensing site and download application licenses as well as control who can manage the identity providers (e.g., Active Directory or Novell eDirectory server) registered with a Directory Server licensing site.

At the organization level, you can grant specific accounts the ability to manage licenses for a specific organization.

Introducing the Laserfiche Social BPM Preview

Laserfiche Social BPM is a website where users can collaborate, share ideas, and learn. Users can start discussions or ask questions for the entire community, or they can create content within public or private groups. The Laserfiche Rio 9.2 release includes a preview of Laserfiche Social BPM.

Laserfiche Social BPM allows users to:

- Create content by starting discussions, posting announcements, asking questions, and replying to others.

- Collaborate with the right audience. With public, private, or hidden groups, users can share their content with the right group of people.

- Subscribe to interesting topics and posts. Users can easily keep up with the conversations and subjects they care about with subscriptions. When users subscribe to a topic or post, they'll receive email notifications when there's new content to see.

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Description:
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