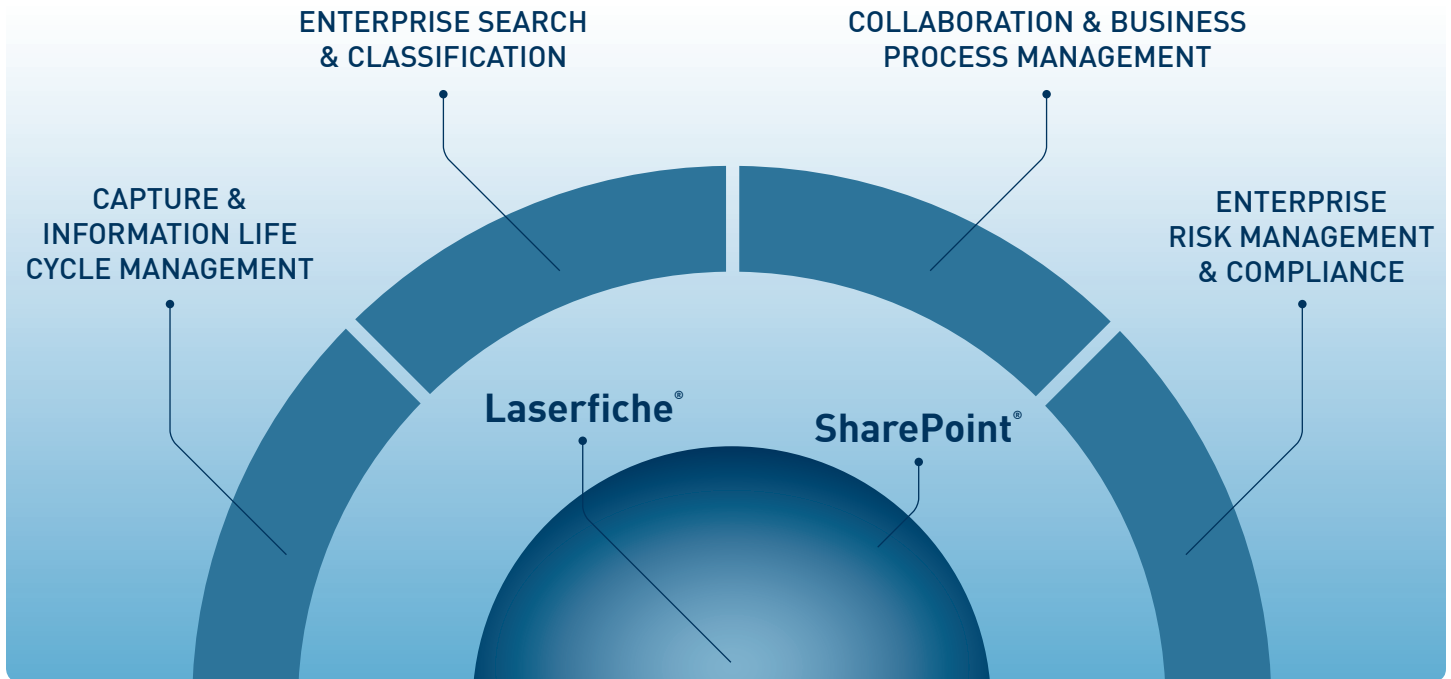


# Agile ECM

Engineered with Laserfiche® and SharePoint®



“What sets Laserfiche apart from other ECM solutions is its ease of administration and use, which is why we chose it when we standardized our entire county. Laserfiche is the best choice for IT professionals, because it offers more functionality, lower overhead costs and an excellent ROI.”

—Darlene Hale, IT Director  
LaPorte County, IN

Electronic documents. E-mails. Faxes. Paper. Photographs. Audio. Video. Instant messages. Tweets. As more and more content flows in and out of organizations—and regulatory and compliance mandates raise pressures on IT departments—the need to control unstructured content and improve data governance is increasing.

Leading companies worldwide are turning to enterprise content management (ECM) to improve their information management infrastructure. But navigating the marketplace for ECM solutions is a time-consuming and confusing task, with most messages influenced by vendors who have cobbled together a set of complicated tools that are difficult to deploy, confusing to configure and complex to administer.

## The time is right for Agile ECM engineered with Laserfiche and SharePoint.

Built on Microsoft standards that make it widely interoperable, extensible and easy to administer, Agile ECM is a critical necessity for IT managers at any dynamic organization, offering:

- ▶ Rapid deployment.
- ▶ Streamlined development.
- ▶ Central control over standards, security and auditing, while still offering the flexibility to service individual business units.

**Laserfiche®**  
Run Smarter®

## Agile ECM: A Foundational Component of Data Governance and Collaboration

Agile ECM organically expands throughout your organization, crossing departmental boundaries and integrating easily with line-of-business applications and legacy systems to eliminate data silos.

And because Agile ECM speeds and simplifies collaboration by automating content-related activities, it offers centralized control of business records spread across disparate content repositories and ensures that data is consistent, reliable, useful and available.

“Laserfiche delivers a complete offering to customers seeking an integrated content management and SharePoint solution. It’s a scalable solution that’s easy to install, easy to administer and easy to use.”

..... —Jerry Carnley, CIO  
Spindletop MHMR Services

### HR Onboarding Using Agile ECM: One Situational Example

Every company has situational applications that create content-related business challenges. For example, hiring new employees creates a difficult-to-control flow of content that crosses multiple departments and business processes.

By automating these content-related activities, Agile ECM serves as integrative middleware, producing enhanced functionality and increased use without programming customized software modules from scratch.

#### 1 Resume Submitted to Recruiting Manager

- ▶ Resume submitted online shows up in recruiter’s SharePoint portal.
- ▶ Recruiter assembles application package and sends it to the ECM repository, where the file type is normalized for distribution; naming, indexing and filing conventions are standardized using SharePoint metadata; and the application package is filed in dynamically created records folders.

#### 2 Hiring Manager Receives Applicant File

- ▶ System sends hiring manager an e-mail containing a link to the application package and a copy of its contents in the body of the e-mail for review on a mobile device.
- ▶ Hiring manager makes a choice to determine the next step in the process—“reject” or “contact for interview.”
- ▶ System notifies recruiter of the next step, and, if appropriate, schedules tasks in the SharePoint portal.

#### 3 Next Steps Sent to Recruiter; Applicant Interviewed

- ▶ If an applicant is rejected, system sets an event date, which triggers the start of a retention schedule. The recruiter’s SharePoint portal is cleaned up—all tasks and references to the applicants are removed.
- ▶ If an applicant is being interviewed, their application package is moved to an interview queue accessible through the SharePoint portal.
- ▶ When the candidate comes in for an interview, completed documentation is scanned directly into the candidate’s file, where it is accessible by everyone involved in the hiring process.

#### 4 Applicant Hired; HR Takes Over

- ▶ Hiring manager selects “to hire” in the candidate’s file.
- ▶ All tasks and links relating to the new hire are removed from the recruiter’s SharePoint portal.
- ▶ New hire’s files are automatically moved to the Human Resources section of the ECM repository.

#### 5 New Hire Paperwork Received

- ▶ When an employee is hired, an alternate retention schedule for their application package is automatically initiated.
- ▶ New hire completes all necessary employment paperwork and HR clerk scans it into the ECM repository.
- ▶ Documents are automatically sorted and filed into records folders that comply with various retention schedules.
- ▶ To facilitate data security, shortcuts to records are created in HR’s employee folder.

## Agile ECM Shines in a Microsoft-Driven Environment

Laserfiche has always developed on top of Microsoft technologies to simplify system administration. Agile ECM engineered with Laserfiche and SharePoint takes this tradition to a new level, with support for developers who need to control content, extend collaboration and tailor specialized business processes to departmental needs, without interfering with centralized administration and control.

### SharePoint Interoperability

- **Laserfiche Web Part for SharePoint:** Provide personalized, authenticated access to stored content from SharePoint pages. Directly scan or upload content into the secure ECM repository from SharePoint.
- **Laserfiche Records Center Service:** Minimize the content stored in SharePoint and move it into a centralized Laserfiche ECM repository.
- **SharePoint Search Handler for Laserfiche:** Provide federated search across content stored in both Laserfiche and SharePoint from SharePoint pages.
- **Laserfiche Workflow Activities for SharePoint:** Support custom workflow activities, including SharePoint-specific activities.

### Workflow/ Business Process Management

- **Workflow Designer:** Create workflows by simply flowcharting your business processes.
- **Built-in Activities:** Use built-in activities to build workflows quickly.
- **Extensible Rules:** Create custom VB.NET and C# scripts using a built-in editor, or design your own activities.
- **Windows Workflow Foundation (WF):** Integrate primary applications into ECM workflows using the Windows Workflow Foundation and the .NET framework. Export ECM workflows as WF workflow definitions; use Visual Studio .NET to incorporate them into your own WF workflows.

### Extensibility/Integration

- **Code Library:** Jump-start custom integrations from working examples, with complete code samples, which can be used out of the box or extended.
- **Uniquely Addressable Documents:** Access any Laserfiche document with a unique URL or entry ID.
- **Extensible Web Interfaces:** Customize Web interfaces built on ASP.NET.
- **NET Toolkit:** Create custom Laserfiche integrations with .NET assemblies that run natively on both 32 and 64 bit machines.

### Windows/Office Interoperability

- **Microsoft Office:** Send documents directly to the ECM repository from Office applications.
- **Microsoft Outlook E-mail:** Archive e-mail from Outlook and automatically extract message properties as metadata.
- **Web Folders:** Expose the ECM folder structure through Windows Explorer for simple drag/drop and browsing.
- **WebDAV:** Access documents stored in the ECM repository through Web Folders and other WebDAV extensions.

### System Administration

- **MMC:** Manage your ECM repositories through a Laserfiche Administration Manager snap-in for Microsoft Management Console (MMC).
- **Event Tracing:** Troubleshoot with Event Tracing for Windows (ETW), supplemented by HTTP logging and real-time "console mode."
- **Windows Event Log:** Monitor system health with an errors and warnings reporting system integrated with the Windows Event Log.
- **WMI:** Automate administrative tasks with Windows PowerShell through Laserfiche Windows Management Instrumentation (WMI) or .NET interface.
- **Laserfiche PowerShell Provider:** Implement cmdlets and a navigation provider for managing Laserfiche ECM servers.

### Security and Auditing

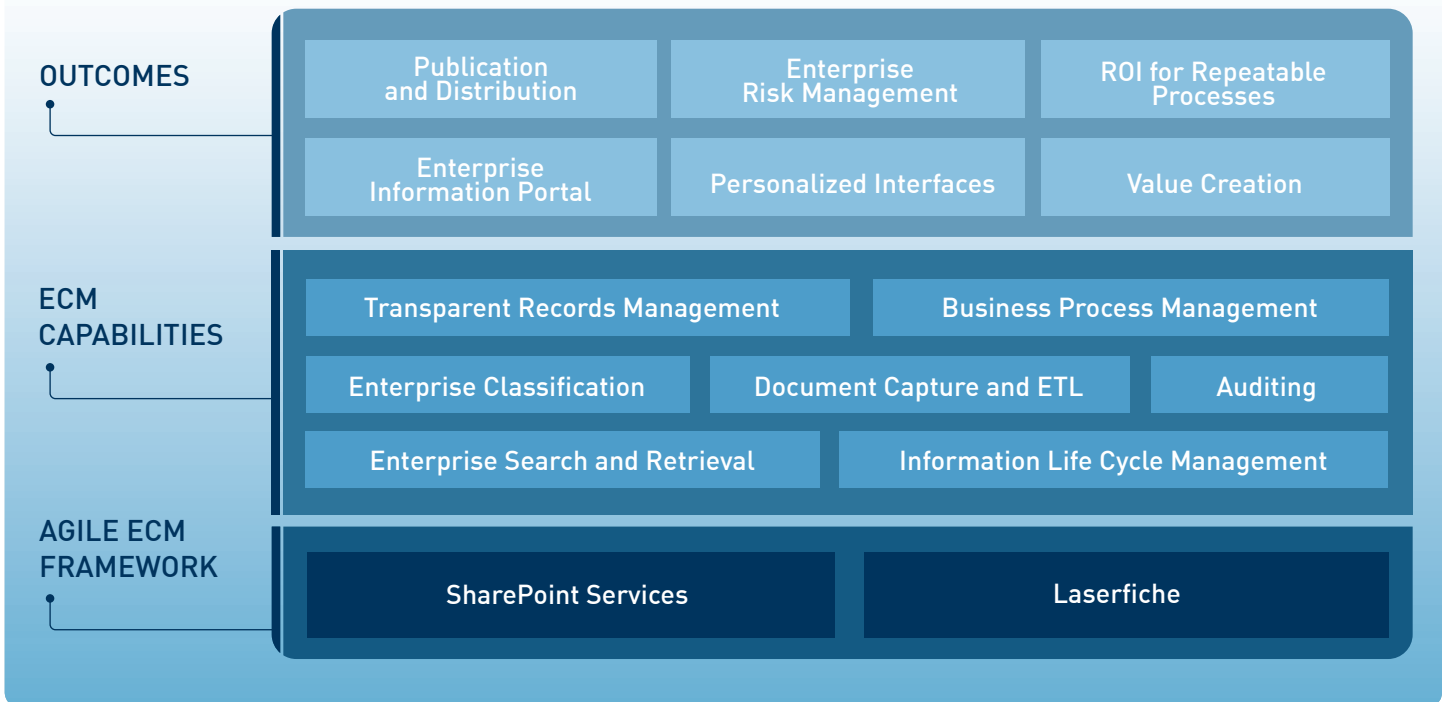
- **Single Sign-On:** Authenticate with a Windows domain account in Active Directory.
- **Permission Inheritance:** Configure access through group membership, and allow users to inherit security settings from the groups they belong to.
- **Access Control Lists:** Secure documents through access control lists, security tags and privileges.
- **Role-Based Authorization:** Use granular permissions to grant access based on a user's role.
- **Privilege Delegation:** Delegate security to more than one user with individual permissions.
- **Secure Deletions:** Secure deletions with DoD 5022.22M compatible deletion protocols.
- **Secure Recycle Bin:** Documents in recycle bin have original security fully intact. Administrators can control which users are allowed to permanently purge items from the recycle bin.
- **Secure Communication:** Support for SSL for secure communication.
- **Auditing:** Fully audit all system events.
- **Reporting:** Generate Web-based audit reports, available as tables or charts.
- **SQL Reporting Compatibility:** Generate audit reports with Microsoft SQL Server Reporting Services.

## ► Explore Agile ECM

Want to learn more? Read case studies, watch video demonstrations and ask questions about configuration and support at:

[laserfiche.com/Agile](http://laserfiche.com/Agile)

## Agile ECM Architecture



“Laserfiche provides an ECM standard that handles automated, repeatable processes in every department, while still giving each the flexibility that they need. And it helps my staff work more efficiently, because I establish central rules that are then administered by individual department heads.”

..... —Caren Skipworth, IT Director  
Collin County, TX  
Winner, Texas CIO of the Year, 2009

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