

# Laserfiche Rio<sup>®</sup>

Optimize your enterprise with agile ECM

# Agile ECM for the Agile Enterprise

It's tough for the IT department to promote organizational agility when it's stuck managing multiple siloed enterprise content management (ECM) systems. In addition to being expensive and time-consuming, a lack of control over enterprise content is a recipe for disaster when it comes to compliance.

But what's the IT department to do when leadership teams want centralized processes to mitigate risks and optimize costs, but employees don't want to use an inflexible system that forces them all to work the same way?

**Laserfiche Rio** is the answer. By combining comprehensive ECM functionality with powerful business process management (BPM), security and auditing tools, Laserfiche Rio provides a **solid ECM infrastructure** that:

- ▶ Manages your content.
- ▶ Grants the IT department central control over standards, security and auditing.
- ▶ Gives individual departments flexibility to customize their filing structures, views and workflows.

And because Laserfiche Rio integrates with your existing IT portfolio, it also supports intelligent decision making enterprise-wide.

With a fundamental design structure engineered to meet the needs of the IT department, Laserfiche Rio is designed to be easy to purchase, easy to deploy, easy to support and easy to extend. Not only can organizations configure their own workflows, customize templates and write their own applications without hiring expensive consultants, but Laserfiche Rio is also flexible enough for department heads to easily customize and manage their own systems without any assistance from the IT department.

It's this ingenious approach to enterprise information management—with unique features including unlimited servers and repositories, capture workflows and transparent records management—that makes Laserfiche Rio the ideal choice for organizations seeking to maximize agility without sacrificing value.

“ Laserfiche provides an ECM standard that handles automated, repeatable processes in every department, while still giving each the flexibility it needs. 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

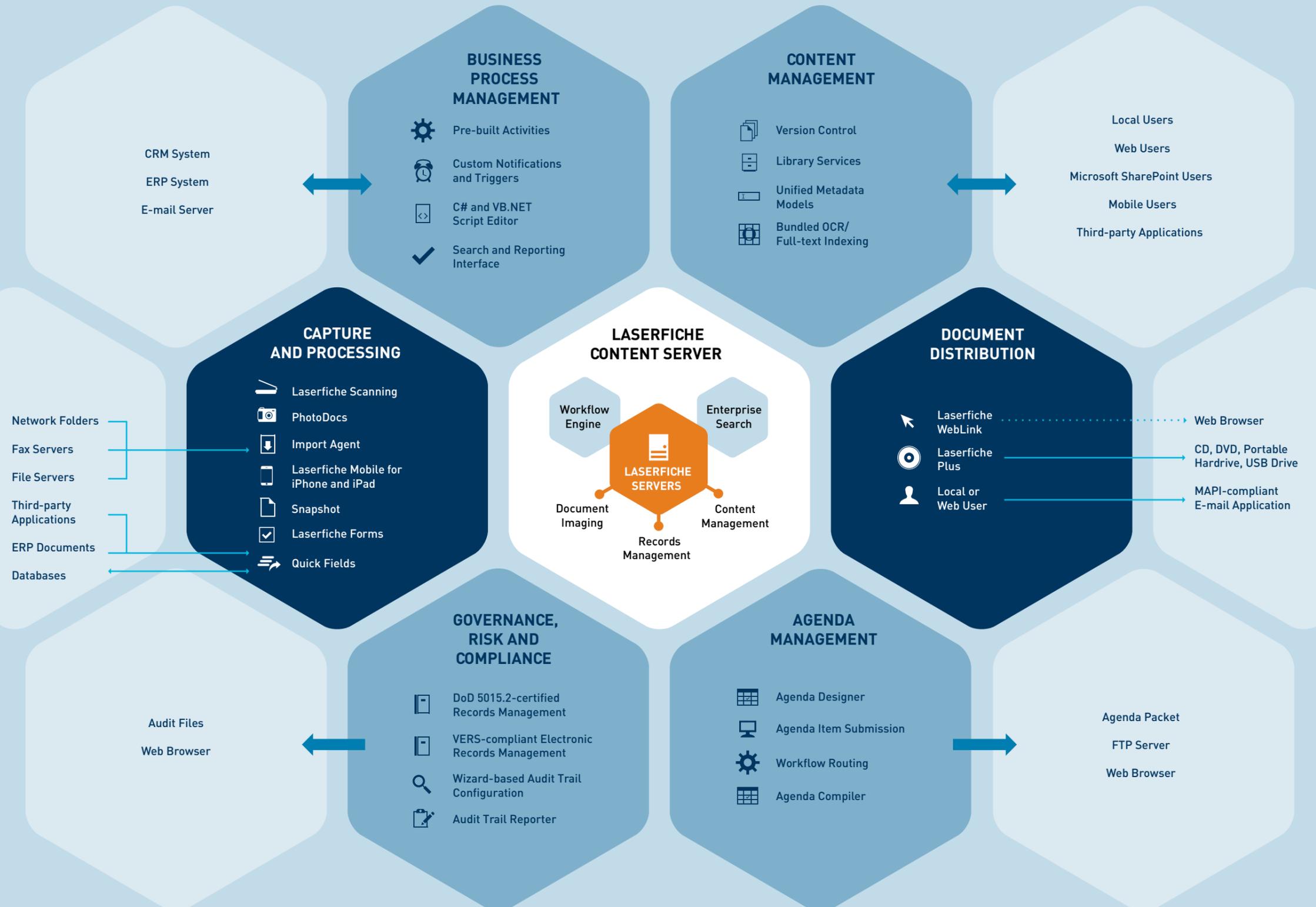


# System Topology

The functionality you need now and the scalability you'll want later.

## The Laserfiche Rio system includes:

- ▶ A **licensing server** to produce licenses as you determine system topology based on your specific needs.
- ▶ Unlimited **Laserfiche content servers** that provide document imaging, document management and records management functionality as part of the core architecture—not through separate modules that are stacked together.
- ▶ A feature-rich **Web interface** that does not require any software to be installed, maintained or updated at the workstation level.
- ▶ **Mobile applications** that enable you to capture, upload and work with documents while on the go.
- ▶ The **Laserfiche Workflow system**, capable of automating business processes in high volume transactional environments, as well as customizing the way the system reacts to user input.
- ▶ A built-in **auditing solution** for security and compliance.
- ▶ DoD 5015.2-certified **Laserfiche Records Management Edition**, with integrated records management, security, auditing and reporting capabilities.
- ▶ **Production-level document capture and processing** to automate document identification, indexing, classification and filing.
- ▶ An **electronic forms solution** that ensures appropriate action on submitted forms is taken quickly with user-defined approval processes and task lists.
- ▶ Fully customizable, read-only **public Web portals**, with unlimited public portal licensing.
- ▶ An **SDK** that includes COM, .NET and Java libraries, as well as an ADO.NET provider.



# The Laserfiche Rio Advantage

With its agile ECM framework and philosophy, Laserfiche Rio is designed to give your organization central control over its information infrastructure, including standards, security and auditing, while also offering individual departments, offices and business units flexible content and business process management.

This unique design creates value by providing a single system that meets the needs of all departments while improving compliance by implementing a central point of control over enterprise information assets.

## Completely Integrated Capture and Processing

- ▶ Integrate document capture with document-driven business process automation with Laserfiche Quick Fields, the only production-level document capture and processing platform developed exclusively for a specific ECM system.
- ▶ Extend business processes to the point of capture, make information accessible immediately and audit interactions with information regardless of where it is in the capture process.
- ▶ Bring capture to mobile workers with patented photo processing technology and iPhone and iPad applications.



Laserfiche Quick Fields includes a variety of tools to automate document identification, indexing, classification and processing.

## Mobile Content Management

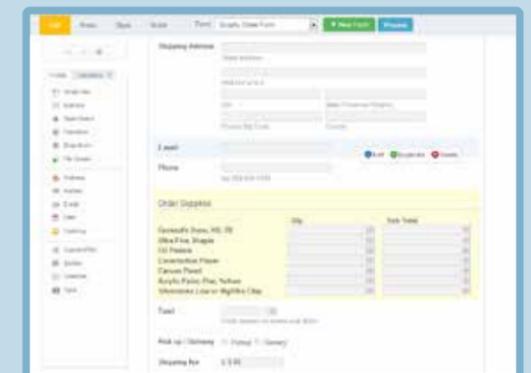
- ▶ Securely extend capture capabilities to the field with an intuitive, device specific application developed for the iPhone and iPad, or from other mobile devices with lightweight web interfaces.
- ▶ Upload photos of documents directly from the iPhone or iPad (which are not stored locally for security purposes), or send electronic documents, Dropbox files and e-mail attachments into the Laserfiche repository from the iPad.
- ▶ Protect the repository from unauthorized access in the event of device loss or theft by disabling automatic login to Laserfiche.



With Laserfiche Mobile for iPhone and iPad, participate in business processes—from anywhere, at anytime.

## Electronic Forms

- ▶ Quickly and affordably implement the process rules and management oversight necessary to ensure accurate data collection and processing.
- ▶ Initiate or continue workflow processes with a form builder that includes an embedded workflow engine and task lists—ensuring that appropriate action is taken quickly.
- ▶ Provide users with appropriate security rights access to real-time statistics through a dashboard interface for each form and its associated process.
- ▶ Launch processes using a straightforward, web-based design and publishing tool, which enables customizable online forms to be embedded into—or linked from—any page on a Website, Intranet or public portal so that it's easy for employees, customers and other stakeholders to access, complete and submit them.



Laserfiche Forms enables departments to design and include Web forms in business processes—while IT and Operations maintain security and management controls.



# The Laserfiche Rio Advantage

## Core Content Management

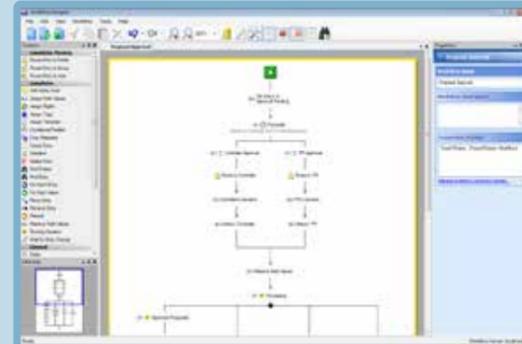
- ▶ Unite document imaging, document management and records management functionality as part of the Laserfiche system's core architecture, not through separate modules stacked together.
- ▶ Eliminate silos by managing and storing content so it is accessible to multiple systems, departments and staff members.
- ▶ Scan, import, search and access documents directly from your SharePoint site with the included Laserfiche SharePoint Integration.



The web client interface does not require any software to be installed, maintained or updated at the workstation level.

## Business Process Management

- ▶ Create workflows with an intuitive, graphical design tool that provides a top-down process map, toolbox of activities and wizard-driven configuration.
- ▶ Launch business processes directly from the Laserfiche Client, Laserfiche Workflow or Laserfiche Web Access.
- ▶ Improve visibility into your business processes with Workflow instance details that provide information—including new charts, statistics and data—about specific times a workflow ran.
- ▶ Increase transparency by providing business process participants with customized instructions at any stage in the process.
- ▶ Automatically notify participants of any pending or overdue work they need to complete for the business process to continue, as well as the resolution of completed steps.
- ▶ Support enterprise-level integration strategies with built-in activities to automate the process of retrieving and updating information from third-party databases.
- ▶ Integrate with line-of-business applications by using scripts, creating custom activities and using the Laserfiche Workflow SDK.
- ▶ Troubleshoot, optimize and report on system processes with an included search and reporting interface.



The Laserfiche Workflow system is designed to be highly configurable and extensible.



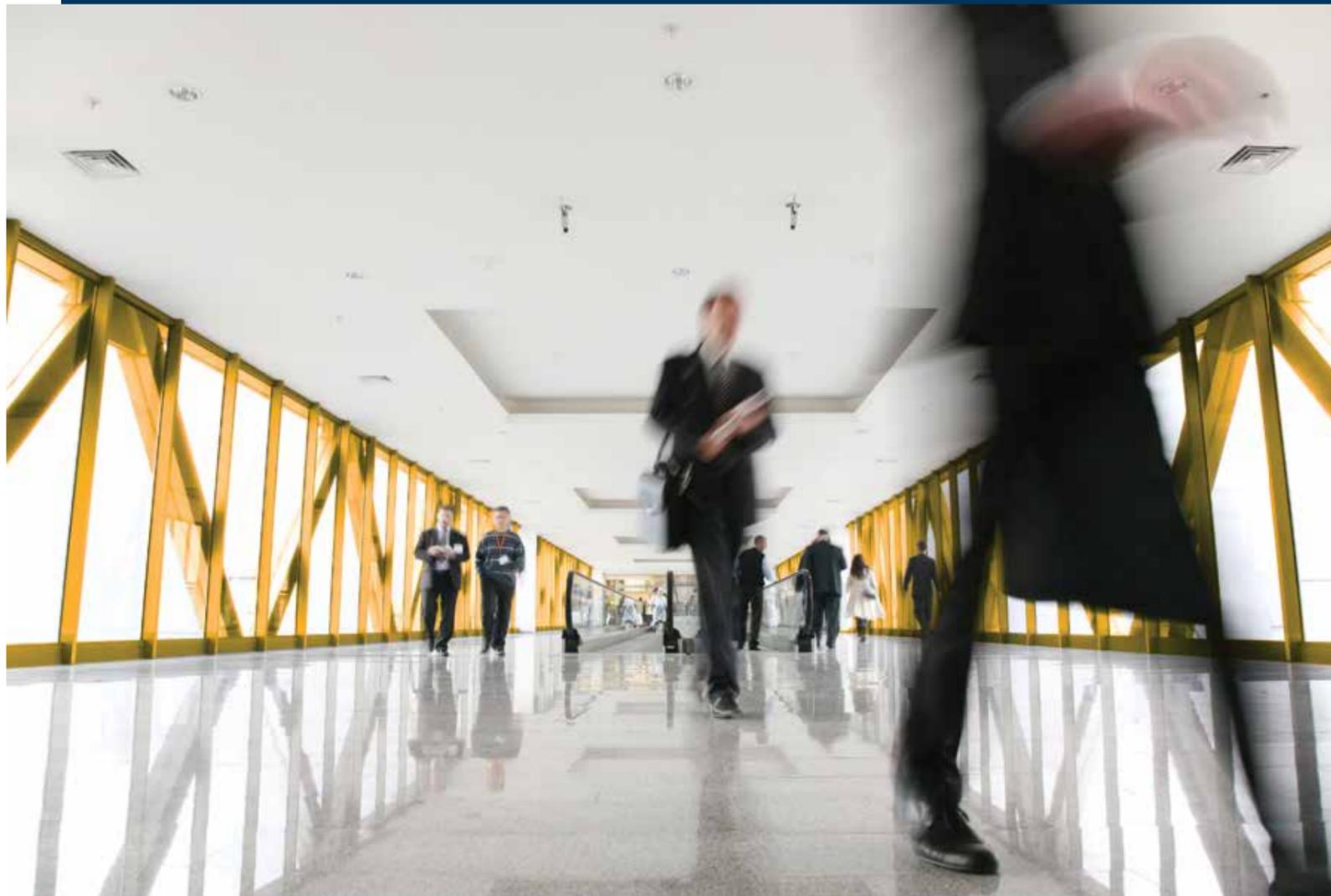
Laserfiche business processes offer customized instructions for process participants and increased monitoring and reporting.



“ Using Laserfiche Rio, Emirates Petroleum Product Company and four departments in the ENOC group have gained centralized control over our data. Laserfiche Rio's powerful workflow tools and the Laserfiche SharePoint integration have simplified information sharing and automated operations between departments. ”

Sina Khoory / Group IT Manager / Emirates National Oil Company

# The Laserfiche Rio Advantage

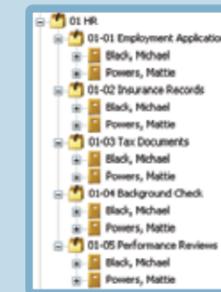


“ Laserfiche Rio gives us the flexibility to manage our ECM infrastructure without having to continually repurchase different licensing and add different modules. That’s really important. ”

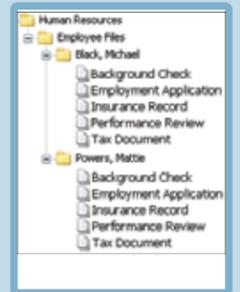
Willa Zandy / IT Director, ECOM

## Controlled and Flexible Governance

- ▶ Simplify governance by integrating DoD 5015.2-certified records management with Laserfiche Workflow to dynamically build customized views of the repository for individual business units.
- ▶ Share and enforce best practices by automating manual processes, including content classification and filing.
- ▶ Use VERS-certified Laserfiche digital signatures to automatically sign and validate documents as they are created, reviewed and archived, without leaving the Laserfiche environment.
- ▶ Archive and manage Microsoft SharePoint documents in the Laserfiche repository once the collaboration phase is complete.



Records Manager View

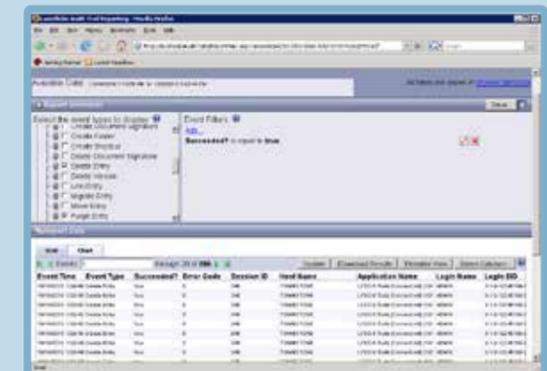


User View

Dynamically configure multiple views of the same repository, so the records management layout isn't exposed to general users.

## Comprehensive Risk Management

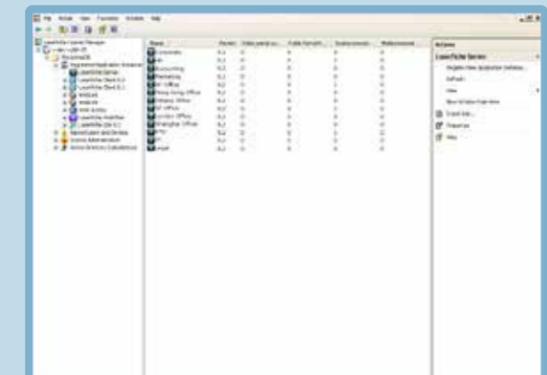
- ▶ Build a common, enterprise-wide ECM infrastructure that not only meets outside regulations but also uses auditing and monitoring to incorporate internal controls.
- ▶ Empower compliance officers to regularly review user activity, assess the effectiveness of internal control mechanisms and demonstrate regulatory compliance with Laserfiche Audit Trail, Laserfiche Rio's built-in solution for security and compliance.
- ▶ Maintain granular control over content with access control lists, folder filtering, security tags and privileges.



Track almost any user action, from login and logout to creating, modifying, printing and deleting documents.

## Clear-Cut Administration

- ▶ Perform administrative tasks, such as creating user accounts and setting security, with a desktop Administration Console or from any browser with the Laserfiche Web Administration Console.
- ▶ Deploy test, development and production systems with the Laserfiche Rio License Manager.
- ▶ Update or modify metadata, security profiles, repository structure and file plan parameters through the same intuitive tools used for initial configuration.
- ▶ Simplify integration with a comprehensive SDK which includes pre-built merge modules, documentation, libraries (COM, .NET and Java) and an ADO.NET provider.



The Rio License Manager produces system licenses to deploy test, development and production systems.

# A Pragmatic Approach to Simplify Complex IT Environments



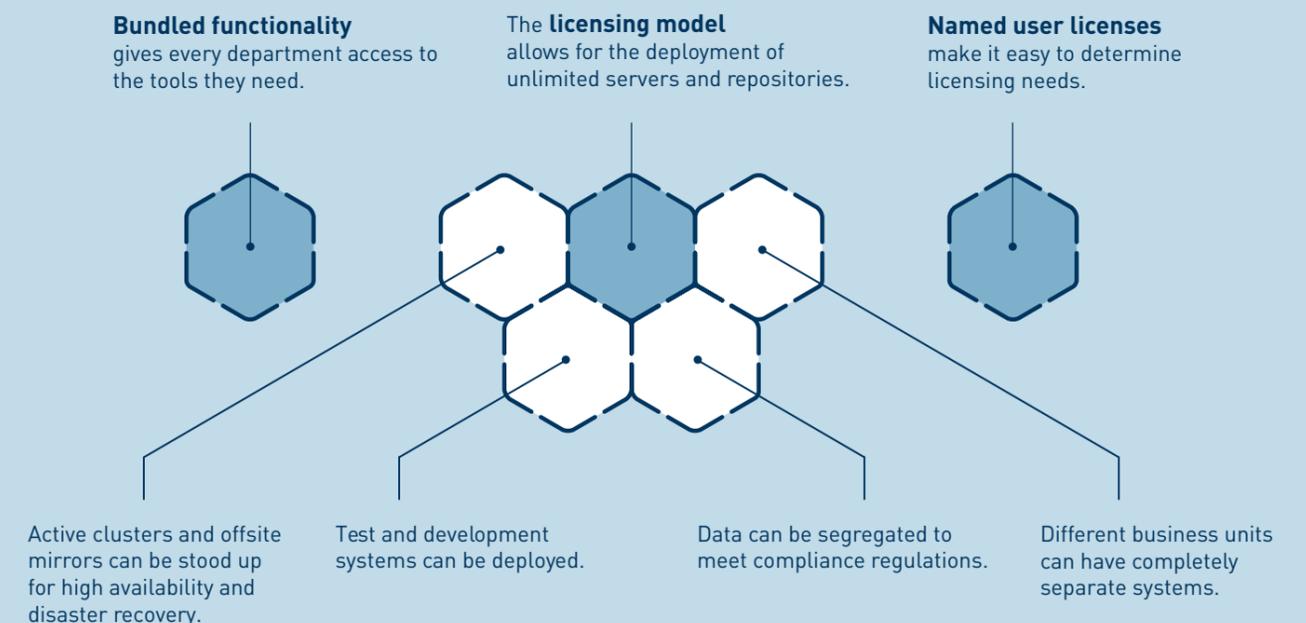
**Laserfiche Rio** was developed specifically to meet the needs of organizations that view ECM technology as a foundational component of their technical infrastructure. With bundled functionality, unlimited content servers and its own licensing server, the system provides you with unmatched deployment flexibility.

- ▶ **Scale easily from one hundred to hundreds of thousands of users.** Named user licenses with significant volume discounts simplify the procurement process, eliminating long requisitions and making budgeting for an enterprise deployment much easier.
- ▶ **Integrate with your existing IT portfolio.** As an open platform, Laserfiche Rio facilitates and encourages integration with line-of-business and legacy applications to solve transactional document problems and provide a rapid ROI.
- ▶ **Extend local flexibility.** User acceptance is essential to the success of any ECM project. Laserfiche Rio is designed to provide centralization and standardization without compromising the flexibility and customization of information delivery required by different departments.
- ▶ **Leverage existing skills.** Laserfiche Rio's standardized solutions leverage existing administration platforms—including Microsoft skillsets—and offer a lower total cost of ownership.
- ▶ **Maintain control over your ECM environment.** Support for virtualization, mirroring, test, development and other environments without the need to purchase additional software licenses puts you in complete control of system topology, high availability and recovery.
- ▶ **Grow with your organization.** Because needs change, Laserfiche Rio maintains flexibility to reconfigure system attributes even after release to production—with the same intuitive tools used for initial configuration.

However you choose to deploy Laserfiche Rio, you're empowered with an ECM infrastructure that's designed to maintain momentum, minimize risk and ensure that your final solution meets your needs.

## A Flexible Approach to Enterprise Deployment

Laserfiche Rio provides the flexibility required for deploying an ECM solution throughout the enterprise.



# An Agile Enterprise Infrastructure

Every department and business unit has its own unique needs. Some are looking for simple search-and-retrieval; some need to access information through primary business applications such as GIS or CRM; and some want to automate repeatable processes such as case management, contract management, AP processing and more.

Although there are benefits associated with departmental installations of ECM, the enterprise—and the IT department—benefits most from implementing an agile ECM infrastructure that can quickly and easily be configured to meet multiple departments' needs.

Laserfiche Rio's **agile ECM ecosystem** offers:

- ▶ Quick and easy deployment.
- ▶ Straightforward and adaptable administration.
- ▶ Central control over standards, security and auditing.
- ▶ The flexibility and adaptability necessary to meet the needs of many different departments.

“What ‘high impact’ looks like is different in each department. We needed ECM that would meet the needs of the entire organization, as well as the specialized requirements of individual departments. Standardization on Laserfiche is vital to the long-term success of the whole organization.”

Brandon Jackson / CIO / Gaston County, NC

## The Infrastructure Underpinning Your Connected Framework

### SMARTER OUTCOMES

Publication and Distribution	Enterprise Risk Management	ROI for Repeatable Processes
Enterprise Information Portal	Personalized Interfaces	Value Creation

### VALUABLE CAPABILITIES

Transparent Records Management	Business Process Management	
Enterprise Classification	Document Capture and ETL	Auditing
Enterprise Search and Retrieval	Information Life Cycle Management	

### AGILE FRAMEWORK

By serving as the universal repository for all organizational content (including paper, forms, audio/video files, e-mail, etc.), Laserfiche Rio provides a single point of control for complete life cycle management.	By acting as integrative middleware that links into legacy systems and line-of-business applications such as GIS, SIS, ERP and more, Laserfiche Rio allows users to access information in the manner and environment in which they are most comfortable.	By enabling shared services, Laserfiche Rio eliminates data silos and automates cross-functional activities, accelerating collaboration and data processing.
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# The Best Choice for Microsoft-Driven Organizations

Laserfiche has always built on Microsoft technologies to support close integration with industry-standard platforms. Laserfiche Rio takes this tradition to a new level, featuring even more transparent integration with Microsoft Windows, Office, Dynamics and SharePoint so that your organization can more easily leverage existing investments in Microsoft technology and staff skill sets.



## System Administration

- ▶ **Administration:** Perform administrative tasks, such as creating user accounts and setting security, with the desktop Administration Console, a snap-in for Microsoft Management Console (MMC), or from any browser with the Laserfiche Web Administration Console.
- ▶ **Windows Event Log:** Monitor system health with an errors and warnings reporting system integrated with the Windows Event Log and the Laserfiche Web Administration Console.
- ▶ **MS SQL Support:** Tie into existing backup structures with MS SQL-based architecture.
- ▶ **Event Tracing:** Troubleshoot with Event Tracing for Windows (ETW), supplemented by HTTP logging and real-time "console mode."
- ▶ **License Manager:** Manage licenses for your Laserfiche software and allocate licensed products, features and users as appropriate for your site.

## Windows/Office/SharePoint Interoperability

- ▶ **Microsoft Office:** Send documents directly to Laserfiche from Office applications. Open Office documents in Laserfiche directly in their native applications.
- ▶ **Microsoft Outlook E-mail:** From Laserfiche, archive e-mail and automatically extract message properties as metadata, as well as e-mail documents directly from the repository. From an Outlook e-mail message, browse the Laserfiche repository to attach documents.
- ▶ **Web Folders/WebDAV:** Expose the Laserfiche folder structure through Windows Explorer for simple drag-and-drop and browsing.
- ▶ **Microsoft SharePoint:** Add document imaging and records management to SharePoint out of the box with Web Parts, a Records Center integration and a search integration. Use Laserfiche Workflow to automatically create tasks for users within SharePoint.

## Business Process Management

- ▶ **Workflow Designer:** Create workflows with an intuitive, graphical design tool that provides a top-down process map and wizard-driven configuration.
- ▶ **Built-in Activities:** Create workflows quickly from a toolbox of built-in activities that include routing choices, Laserfiche actions, enterprise integration, PDF form processing, and digital signature options.
- ▶ **Customized Routing:** Route documents based on conditions you define or specify different actions to be taken before or after a deadline, or after a specified event occurs.
- ▶ **PDF Forms:** Read information from PDF forms to expedite business processes, automatically file information, or assign metadata. Also fill out a PDF form with data from a Laserfiche entry or a third-party
- ▶ **Laserfiche Forms:** Create electronic forms with embedded BPMN-compliant routing capabilities.
- ▶ **Extensible Functionality:** Create custom VB.NET and C# scripts using a built-in editor, or design your own activities.
- ▶ **Workflow Operations:** Administer workflows across your organization with import/export capabilities, workflow instance reporting, manual termination functionality, and user roles and security options.
- ▶ **Windows Workflow Foundation (WF):** Use activities written for Windows Workflow Foundation to extend Workflow functionality to all line-of-business applications.
- ▶ **Laserfiche Business Processes:** Alert and direct users regarding their responsibilities for completing business process tasks, and report on customizable steps in that process.

## 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 5022.2M-compatible deletion protocols.
- ▶ **Secure Recycle Bin:** Documents in the recycle bin have their original security fully intact. Administrators can control which users are allowed to permanently purge items from the recycle bin.
- ▶ **Volume Checksums:** Verify that document contents have not been altered outside of Laserfiche.
- ▶ **Secure Communication:** Support for SSL for secure communication.
- ▶ **Digital Signatures:** Sign and validate document contents directly within your repository using digital signatures.
- ▶ **Security Watermarks:** Create mandatory watermarks for printed, exported or viewed documents.
- ▶ **Auditing:** Track changes to all system events with a built-in auditing solution for security and compliance. Create and view reports as tables or charts through the Audit Trail Web Reporter portal, or further customize them using a .NET library or Microsoft SQL Reporting Services.

# The Best Choice for Microsoft-Driven Organizations

“ Given Laserfiche’s experience and dedication to the Microsoft suite of technology, we saw that it delivers a complete offering to customers seeking an integrated content management and SharePoint solution. ”

**Jerry Carnley** / Chief Information Officer /  
Spindletop Mental Health Mental Retardation Center

## Extensibility/Integration

- ▶ **Uniquely Addressable Documents:** Access any Laserfiche document with a unique URL or entry ID.
- ▶ **Laserfiche SDK:** Create custom Laserfiche integrations with comprehensive, well-documented and production-tested .NET, COM and Java libraries.
- ▶ **Solutions and Integrations:** Jump-start your Laserfiche implementation with expert advice, from tips and tricks to custom integrations. The Laserfiche Solution Exchange and the Support Site’s Code Library offer working examples, often with complete code samples, which can be used out of the box or extended.
- ▶ **Workflow SDK:** Work with the Laserfiche Workflow engine by integrating enterprise applications or creating custom business process steps.
- ▶ **Forms Scripting:** Customize form layout and behavior using standard CSS and JavaScript, or pull user data from primary applications to pre-populate forms for known audiences.
- ▶ **Quick Fields Script Editor:** Create C# or VB.NET scripts and run them as needed at various stages of document creation, identification or processing, or start workflows when documents are stored in Laserfiche.

## Certificates and Compliance

- ▶ **Section 508:** Compliant with Section 508 standards, providing for equal access to electronic data in Laserfiche to people with disabilities.
- ▶ **DoD Records Management:** Certified in the Department of Defense 5015.2 version 3 design criteria standard for electronic records management, the accepted standard for many state, county and local governments.
- ▶ **VERS:** Certified with the Victorian Electronic Record Strategy (VERS) requirements, a world-recognized standard for reliably and authentically preserving electronic records over long periods of time.
- ▶ **Digital Signatures:** Integrated solution that complies with FISMA, CFR Part 11 FDA, FIPS, VERS and Clinton E-Signatures Act standards.



# Protect the Value of Your ECM Investment

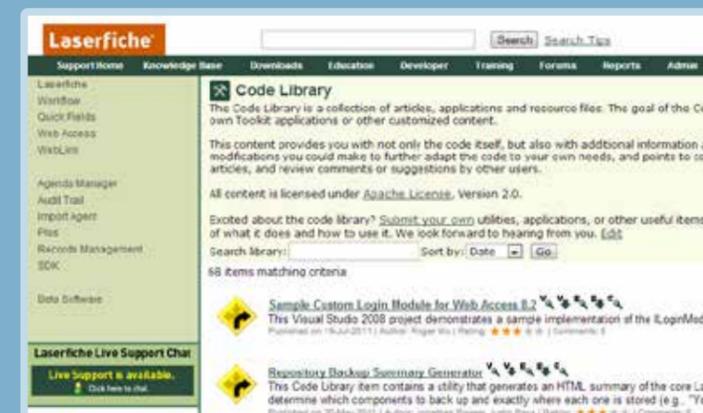


Technology represents one of the most significant investments you make in your organization's success. That's why **Laserfiche is committed to constantly improving its product suites to help you meet new business challenges.**

The Laserfiche Software Assurance Plan (LSAP) provides your organization with these enhancements as soon as they're released, along with the technical support and detailed technical material that preserves and extends the value of your Laserfiche investment.

LSAP helps you take the guesswork out of budgeting by bundling everything you need to maintain your Laserfiche system into a simple annual payment. It ensures that you have every resource you need to meet technical challenges and expand your Laserfiche infrastructure, including:

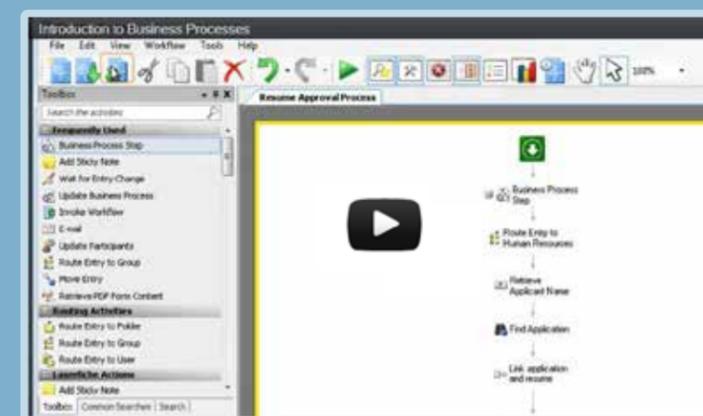
- ▶ **Rapid-response technical support.** Your Laserfiche reseller and the Laserfiche support team will promptly troubleshoot and resolve any issues that arise—before they impact operations or affect staff productivity.
- ▶ **Online support resources.** Your staff receives access to the Laserfiche Support Site, where they'll find the detailed technical information that helps them optimize system performance and maximize uptime, as well as integrate your document repository with your organization's other line-of-business applications.
- ▶ **The latest hotfixes, updates and patches.** These critical items ensure that your Laserfiche system continues to operate at peak efficiency.
- ▶ **New releases.** You'll make sure your system stays current, as new releases of your licensed products are included at no additional charge.
- ▶ **An easy path to growth.** We're committed to continuously improving and expanding the Laserfiche product suite. And as we do, you can credit 100% of the purchase price of your current Laserfiche software toward any new product line purchases.



Downloadable scripts and custom applications in the **Laserfiche Code Library** help your IT staff easily extend Laserfiche functionality.



**Support Site Forums** provide an interactive location to discuss product features and functionality with Laserfiche developers and other members of the Laserfiche community.



**Video tutorials** provide hands-on instruction on how to use Laserfiche most effectively.

# An Entire Ecosystem of Support



With a world-class community, extensive training options and more, Laserfiche provides customers with more than just software—it provides an entire ecosystem of support for delivering value quickly, easily and without the need to bring in expensive experts at every turn.

Since 1987, the collaborative experience of thousands of users, resellers, developers, integrators, consultants and partners from more than 40 countries on six continents has led to an incredible wealth of knowledge. You can tap into this knowledge in a variety of ways, including:

## TRAINING

- ▶ Annual conference
- ▶ Certified Professional Program (CPP)
- ▶ Regional workshops
- ▶ Webinars

## KNOWLEDGE SHARING

- ▶ Code Library
- ▶ Solution Exchange
- ▶ Integration Marketplace
- ▶ Online forums

## COMMUNITY

- ▶ Luminary blogs
- ▶ Case studies
- ▶ User groups
- ▶ Newsletters

Drive true **organizational agility** by leveraging everything Laserfiche has to offer.

“What sets Laserfiche apart from other ECM solutions is its ease of administration and ease of 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

## Explore Laserfiche Rio Agile ECM

Review the feature matrix, discover industry solutions and get customer perspectives at:

[laserfiche.com/rio](https://laserfiche.com/rio)

## About Laserfiche

Based in Long Beach, CA, with global headquarters in Hong Kong and offices in Shanghai, Toronto, Panama, London, Washington, D.C., and Fort Lauderdale, FL, Laserfiche uses its Run Smarter® philosophy to create simple and elegant enterprise content management (ECM) solutions. Since 1987, more than 32,000 organizations worldwide—including federal, state and local government agencies and Fortune 1000 companies—have used Laserfiche® software to streamline document, records and business process management.

The **Laserfiche ECM system** is designed to give IT managers central control over their information infrastructure while still offering business units the flexibility to react quickly to changing conditions. The Laserfiche product line supports Microsoft® SQL and Oracle® platforms to leverage your existing technology investments, deploys rapidly, enhances efficiency and integrates seamlessly with the applications employees use every day.

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