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Laserfiche Interface Factsheet

Quantios Core Integrations

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Laserfiche Interface Factsheet

This factsheet explains out of the box capabilities of the Laserfiche interface as provided by Quantios.

Key Capabilities

The interface works across the main "Attached To Types" where the Correspondence Store is available.

- **Prospect**
- **Owner**
- **Potential Client**
- **Client**
- **Intermediary**
- **Resource**
- **Entities**

Documents can be linked to the Correspondence Store. These documents will be saved in the correct location in Laserfiche.

The synchronisation between the system and Laserfiche occurs via a messaging table, web services and jobs running on the task scheduler.

The Drag and Drop control can be used to add documents to the Correspondence Store and this will then push those into Laserfiche.

The structure and final placement of the document is handled in Laserfiche and is not part of any setup in the system.

From the Correspondence Store you can Open documents that are saved in Laserfiche. These are opened under the context of the user that clicked the Open button and opens them in the Laserfiche web client.

When opening the Correspondence Store you will see the same results as is held within Laserfiche due to the synchronisation tasks running periodically in the background.

If you Unlink documents from the Correspondence Store they are also removed from Laserfiche and vice versa.

If you link a document into Laserfiche it will arrive in the Correspondence Store.

The Workflow Module is fully integrated with the Laserfiche interface. Documents produced in the Workflow Module are added to Laserfiche on them hitting the Correspondence Store through the standard Workflow functionality.

The following meta-data is synchronised between the system and Laserfiche from the system pushing to Laserfiche.

- **Document Inserted By**
- **Document Date**
- **Attached To Type**
- **Attached to No.**
- **Attached to Name (Formal Name of the Record)**
- **Document Type**
- **Document Sub-Type**
- **Document Expiry Date**
- **Subject (Document Description)**
- **Company Name from the Database**
- **Temp File Path of Document to upload form the system**
- **File Name**
- **Document GUID**
- **Workflow No.**

Where the Attached To Type is Potential Client or Client then we also synchronise the following fields from the system to Laserfiche.

- **ClientAnalysisA**
- **ClientAnalysisB**
- **ClientAnalysisC**
- **ClientAnalysisD**
- **ClientAnalysisE**
- **ClientAnalysisF**

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When a document is uploaded first into Laserfiche the following meta data is sent to the system.

- **Document Date – Defaulting to today's date**

- **Document Type**

- **Document Sub-Type**

- **Laserfiche Entry ID (Unique ID of a document in Laserfiche)**

- **Inserted By - defaulted to USERID**

- **File Name**

- **Document Description**

- **File Extension (derived from the filename)**

The following meta-data updates are pushed into the system when changed in Laserfiche for an existing document.

- **Document Type**

- **Document Sub-Type**

- **File Name**

- **Document Description**

Editing of documents is achieved by editing them directly in Laserfiche.

Documents can be added to Laserfiche directly as long as the mandatory meta-data has been applied.

Exclusions

The Laserfiche interface does not provide the following functionality at present.

- There is not an out of the box migration tool to take documents from other locations into Laserfiche provided by Quantios.

- The interface does not include synchronisation of Data Partitioning configuration and the use of this module within the system. There is additional work that can be carried out to define and implement this structure but this needs to be discussed with your account manager and scoped carefully prior to any work being commenced.

- We do not send any automatic security model replication into Laserfiche.

- Users retrieve and edit documents as themselves under their own credentials. If they do not have access to the document in Laserfiche via Laserfiche permissions, then they cannot open/edit the document from the Correspondence Store. We do not automatically synchronise any user permissions across to Laserfiche.

- Synchronisation of documents is completed under a technical service account user.

- The Meta-Data Setup area of the Correspondence Store can be used but it will not synchronise these values to Laserfiche – this would require development work

- Validation of the meta data added in Laserfiche manually is not validated against the values in the system.

- Opening documents from the Correspondence Store does not open them in the Laserfiche desktop client.

- There is a button to "finalise" the document from the Correspondence Store. This button is not implemented on for this integration.

- Other file paths in the system are still set to server file share locations and do not read from Laserfiche. Examples would be Data Adapter configuration, ad hoc file paths and document templates.

If you have further queries, please contact your Quantios account manager