

## Course Descriptions and Instructors 2012

### Content Delivery

---

#### **CD101: Introduction to Laserfiche**

Instructor: Elizabeth Cunningham, Account Manager + Misty Kalousek, Technical Writer

Thinking about buying Laserfiche? About to implement Laserfiche? Just joined an organization that uses Laserfiche and feeling overwhelmed? This class is for you! Designed for people with limited exposure to the software, this course presents a basic overview of the Laserfiche suite, including customer examples that highlight best-practice use.

#### **CD103: Laserfiche Suite Updates**

Instructor: Carly Meyer, District Manager + Evelyn Crofts, Project Manager

This course presents an overview of new features in each Laserfiche product over the last year, specifically changes to the Laserfiche Client and Administration Console, Web Access, the Web Administration Console, Workflow, and Laserfiche Mobile. It will also preview what's coming in the future and review each product in the Laserfiche suite.

#### **CD105: User's Guide to Laserfiche**

Instructor: Peter Stemler, Account Manager + Misty Kalousek, Technical Writer

This course will introduce you to Laserfiche's two primary client applications: the installed desktop Client and Web Access. You'll learn basic Laserfiche concepts, including an introduction to the Folder Browser and Document Viewer, how to navigate through the software, and when each product is most beneficial.

#### **CD107: Using Laserfiche, Part 1 (lab)**

Instructor: Paul Lee, Presales Engineer

Are you new to Laserfiche? Do you want to be more efficient in your daily use of the software? This hands-on lab course will cover how to work with documents in both the Laserfiche Client and Web Access, including customizing your document view, working with metadata, and applying annotations. This is part one of a two-part series on how to use Laserfiche.

#### **CD109: Using Laserfiche, Part 2 (lab)**

Instructor: Paul Lee, Presales Engineer

Are you looking for Laserfiche basics? For tips on how to make your daily experience with Laserfiche more efficient and enjoyable? This hands-on lab course will cover getting documents in and out of Laserfiche, working with electronic documents, and further customizing your workspace. This is the second of two labs on how to use Laserfiche.

#### **CD111: Tips and Tricks with Laserfiche**

Instructor: Connie Anderson, Technical Writer

Learn searching tips, metadata features, shortcut modifications, and many other time-saving tricks and procedures to help manage documents flexibly and efficiently in the Laserfiche 8 interface.

#### **CD113: Searching in Laserfiche**

Instructor: Clay Turner, District Manager + Misty Kalousek, Technical Writer

(Presentation version of CD115.) Find just what you're looking for in either Web Access or the desktop Laserfiche Client. This course will help you understand how to pick the best search type for the kind of information you want to find, plus you'll learn how to search by specific field, use AND/OR, combine search criteria, use fuzzy match, and many other search tools.

#### **CD115: Searching in Laserfiche (lab)**

Instructor: Paul Lee, Presales Engineer

(Lab version of CD113.) Find just what you're looking for in either Web Access or the full Laserfiche Client. This hands-on lab course will teach you how to pick the best search type for the kind of information you want to find. In addition, you'll learn how to search by name, date, time, annotations, templates, fields, OCR'd text, and many other means.

**CD117: Web Access Deployment Options**

Instructor: Steve Hackney, Lead Sales Engineer

Laserfiche Web Access provides a robust platform to support a variety of roaming and mobile business needs. This session will survey different uses for Web Access, including remote connection and scanning, integrating with Microsoft SharePoint, connecting to your repository with Laserfiche Mobile applications, viewing Laserfiche documents through other interfaces through an iFrame, and even possible integrations with third-party software.

**CD119: Laserfiche in a Mobile World**

Instructor: Brandyn Federlick, District Manager + Evelyn Crofts, Project Manager

In our increasingly mobile world, businesses and organizations demand the ability to extend content outside of the office. This course will cover when and how to use the many options available in the Laserfiche suite for making your Laserfiche information mobile, including Web Access Light, WebLink in mobile browsers, and iPhone and iPad applications, as well as how each option interacts with other Laserfiche products, such as Workflow and PhotoDocs.

**CD121: Introduction to Laserfiche WebLink Public Portal**

Instructor: Mona Huang, Latin America Territory Specialist + Zhiyu Chen, Software Test Engineer

Laserfiche WebLink is a user-friendly public portal site providing read-only Internet access to documents. This session will introduce you to the various components and features of WebLink, including the WebLink Designer, Document Viewer, RSS feeds, Quick Search, Welcome Page, mobile view WebLink reporting, and more. It will also cover public portal licensing and tips and tricks for effective use of the product.

**CD123: Laserfiche Plus**

Instructor: Dennis Ventilacion, District Manager + Robert Strickland, Software Engineer

Laserfiche Plus allows you to publish portions of your Laserfiche repository to portable media—such as DVDs or portable hard drives—that can be accessed offline. Laserfiche Plus provides a number of publishing options, allows you to encrypt the published volumes and bundles the Laserfiche Viewer, providing a portable read-only repository. This course will highlight the options Laserfiche Plus provides and cover a variety of use cases to show how it's being used in the field.

**CD125: Overview of the Laserfiche-SharePoint Integration**

Instructor: Andrew Brown, International Territory Manager + Zhiyu Chen, Software Test Engineer

The Laserfiche 8 platform was designed to simplify integration, and it includes specialized components to facilitate integration with the SharePoint software platform. This session will examine the natural points of integration between the two platforms and provide a demonstration of an integrated solution, as well as demonstrate the Laserfiche-SharePoint 2010 integration and new features.

**CD127: Overview of Agenda Manager**

Instructor: James Shearer, District Manager + Melody Huang, Software Engineer

Agenda Manager is a Web-based application that automates the process of creating and publishing formal agendas for recurring meetings. This class provides a product overview and demonstration of the complete agenda publishing process, from item submission through the approval process and finally agenda creation and distribution. The class is designed for users brand new to the software.

**CD129: Help and the Laserfiche Support Site**

Instructor: Gregory Goodell, Account Manager + Scilla Bennett, Technical Writer

Helpful information about implementing, using, and supporting Laserfiche products is out there, if you know where to look. This session will cover how to find everything from product overviews to context-sensitive help files and specific troubleshooting information. Emphasis will be placed on how to efficiently navigate and search the Laserfiche Support Site, including our interactive user forum, code library, white papers, educational videos, Knowledge Base articles, and more.

**CD151: New Features in the Laserfiche Repository**

Instructor: Connie Anderson, Technical Writer + Jeanie Conner, Software Test Engineer

This course will present the new features in version 8.3 of the Laserfiche Client, Web Access, Administration Console, and Web Administration Console. In addition to what the new features are, we'll cover how and when they're applicable and some basics of how to use them. Specific topics will include version control, digital signatures, template colors, entry listing profiles, and more.

**CD201: Best Practices in Configuring Web Products**

Instructor: Brian McKeever, Software Engineer

The flexible nature of Laserfiche Web products means they can be deployed in a variety of scenarios. In this session, we will discuss some of the factors you will want to consider—such as authentication methods, amount of access to the public, and load balancing—how to incorporate them for a successful deployment, and how to improve user experience.

**CD203: Effective Integration Strategies**

Instructor: Steve Hackney, Lead Sales Engineer

While there are only a few types of integrations that organizations typically need, there are a number of ways to perform each one and the choices can be overwhelming. This course examines the different types of integrations, puts them in context and provides recommendations for developing the most efficient, cost-effective and useful integration strategies.

**CD205: Improving Search Efficiencies**

Instructor: Misty Kalousek, Technical Writer + Jeanie Conner, Software Test Engineer

This course goes beyond basic searching in the Laserfiche Client or Web Access search interface to offer tips for often-overlooked searching tools and options. Topics will include saved searches; Web Access-specific search options; configuring basic search options; basic operators, wildcards, and advanced search syntax; custom quick searches; and best practices for improving overall search efficiency to yield faster results.

**CD207: Customizing WebLink (lab)**

Instructor: Kevin Bell, Presales Engineer

Whether it's making public records available to your citizens or providing access for customers who need to see their files, Laserfiche WebLink is the tool you need for distributing your documents via the Internet. This session gives you hands-on experience with the tools you need to customize the WebLink interface and integrate any of the components into your existing Web page, including the WebLink Designer, integration through URL generation, and customization of WebLink Web components.

**CD209: Creating Custom Search Forms in WebLink (lab)**

Instructor: Pieter Nauta, Training Manager

Once you have Laserfiche WebLink configured to share documents with the public, you may want to configure focused searches for those users. This hands-on lab will walk attendees through how to configure basic and more complex search queries, based on what their public users need to find. Participants should be familiar with general searching principles, as well as how to customize WebLink.

**CD211: Configuring the Laserfiche-SharePoint Integration, Part 1 (lab)**

Instructor: Kevin Bell, Presales Engineer

Laserfiche provides a best-in-class document imaging, content management, and record center archival solution for SharePoint 2010's collaboration portal functionality. This first of a two-part lab will give users who want to use SharePoint as an interface to content stored in Laserfiche hands-on experience configuring Laserfiche Web Part and Search integration. Note: This lab will use a unique virtual machine with Microsoft Office SharePoint Services (MOSS) that is not distributable to VARs. VARs may use the provided lab machines to participate.

**CD213: Roundtable on Tips and Tricks**

Instructor: Laserfiche Staff and Customers

Join our panel of technical and business-implementation experts to go beyond tips, tricks, and product basics. We'll take audience questions about tips and tricks in the Laserfiche Client and Administration Console, including best practices, useful workarounds, common mistakes and how to correct them, and new product features.

**CD251: Launching Web Access from Web-Based Applications**

Instructor: Kevin Bell, Presales Engineer

As Web-based applications regain popularity, your integration needs may shift to focus on Laserfiche Web Access. Specifically, you may want to configure Laserfiche to act as the back-end content repository for another program's front-end view. This course will add functionality to a Web-based system in order to retrieve content stored in Web Access.

**CD301: Platform-Independent Integration**

Instructor: Geoff Hsieh, Solutions Engineer

While standardized architecture is a good goal, mixed platforms are the reality for most organizations. Instead of writing multiple integrations to meet the different requirements of multiple SDKs, use Web services to create an integration framework that can be accessed by all of your business applications. This course provides strategies, recommendations and examples of creating Web services from the Laserfiche SDK and using them to meet enterprise integration requirements.

**CD303: Advanced Searching**

Instructor: Jeanie Conner, Software Test Engineer + Gordon Wong, Software Engineer

This course is for power-searchers, administrators, or anyone who needs to configure searches for others in their organization. It will take attendees in-depth into how to use advanced search syntax, how to make URLs out of search syntax in Web Access, how to configure advanced search options, and how to use indexing node options efficiently.

**CD305: Configuring the Laserfiche-SharePoint Integration, Part 2 (lab)**

Instructor: Kevin Bell, Presales Engineer

Laserfiche provides a best-in-class document imaging, content management, and record center archival solution for SharePoint 2010's collaboration portal functionality. This second of a two-part lab will give users who want to send data back and forth between Laserfiche and SharePoint hands-on experience configuring Laserfiche Records Center and setting up SharePoint workflows. Note: This lab will use a unique virtual machine with Microsoft Office SharePoint Services (MOSS) that is not distributable to VARs. VARs may use the provided lab machines to participate.

**Information Governance**

---

**IG101: Introduction to Laserfiche Security**

Instructor: Brett Hickinbotham, Presales Engineer

(Presentation version of IG102 and IG103.) New to setting up security? The granular security tools in Laserfiche give administrators total control over what users can and cannot do. This presentation will discuss the available options with an overview of Laserfiche Security.

**IG102: Implementing a Security Policy in Laserfiche, Part 1 (lab)**

Instructor: Jake Martinson, Presales Engineer

(Part 1 of 2. Lab version of IG101.) New to security in Laserfiche 8? Administrators can control system functionality, grant administrative privileges, hide metadata fields, and more. This hands-on lab will cover security options available in the Administration Console.

**IG103: Implementing a Security Policy in Laserfiche, Part 2 (lab)**

Instructor: Jake Martinson, Presales Engineer

(Part 2 of 2. Lab version of IG101.) New to Laserfiche Security? Folder-level security gives administrators granular control over user rights and can be set up in such a way to ease the administrative burden. This hands-on lab covers security access from within the Laserfiche Client and Web Access.

**IG104: Configuring and Using Audit Trail**

Instructor: Joshua Lee, Account Manager + Bart Broad, Software Engineer

Laserfiche Audit Trail gives you the ability to record information about repository and document actions and to use this data to generate customized reports about anything from general usage patterns to a history of events pertaining to a particular document. This session will demonstrate configuring and using Audit Trail, including live walk-throughs of example scenarios.

**IG105: Fundamentals of Records Management**

Instructor: Elyse Cooper-Smith, Regional Manager + Roger Wu, Technical Writer

Before you can manage your records efficiently or consider using Laserfiche RME to help simplify the process, you have to speak the language. This course teaches the fundamental concepts and vocabulary associated with records management. If you're new to records management, this course should be considered a mandatory prerequisite before you attend any of the other courses related to records management or Laserfiche RME.

**IG201: Best Practices in Laserfiche Security**

Instructor: Connie Anderson, Technical Writer

Laserfiche offers a wide range of security options, and some methods of security implementation are better than others. This presentation will cover the right ways to set up security to minimize the chances of mistakes and administrative headaches.

**IG202: Implementing the Records Management Edition, Part 1 (lab)**

Instructor: Jonathan A. Kim, Presales Engineer

In Laserfiche, there are two components to implementing the records management edition: configuring the records management objects in the Laserfiche Administration Console and configuring the file plan in Laserfiche. This lab covers the first part and will use scenarios to teach best practices.

**IG203: Implementing the Records Management Edition, Part 2 (lab)**

Instructor: Jonathan A. Kim, Presales Engineer

In Laserfiche, there are two components to implementing the records management edition: configuring the records management objects in the Laserfiche Administration Console and configuring the file plan in Laserfiche. This lab covers the second part and will pick up with the scenarios from the first lab to teach best practices in configuring a file plan.

**IG204: Best Practices for Laserfiche RME**

Instructor: Jonathan A. Kim, Presales Engineer

Managing records in Laserfiche requires you to translate your schedules into a number of different components that will be used to build a file plan. Most often your schedule won't include everything Laserfiche needs, but this gives you flexibility as you determine the most efficient ways to organize and manage records in Laserfiche. This class will cover the best practices related to defining records management objects, using them to design file plans and taking advantage of the missing components of most retention schedules.

**IG205: Roundtable on Security Design and Implementation**

Instructor: Laserfiche Staff and Customers

Join our panel of technical and business-implementation experts to go beyond tips, tricks, and product basics. We'll take audience questions about security design and implementation in the Laserfiche Client and Administration Console, Web

Access, and Web Admin, including best practices, useful workarounds, common mistakes and how to correct them, and new product features.

**IG301: Advanced Topics in Security**

Instructor: Pieter Nauta, Training Manager + Andrew Schoonmaker, Software Test Engineer

Have a security set up that's bigger or more complex than most? Tools like volume encryption and audit log tamper detection may be just what you need. This presentation covers new security functionality along with options beyond standard folder and user rights.

**Enterprise Deployment and Management courses**

---

**EDM101: Overview of Laserfiche Architecture**

Instructor: Brett Hickinbotham, Presales Engineer

New to Laserfiche 8 administration? Do you know the difference between the volume and the database? This presentation covers the repository layout and how the various Laserfiche modules fit into the mix.

**EDM102: Introducing the Laserfiche Web Administration Console**

Instructor: Linda Kao, International Marketing Strategist + Julia Zhu, Software Test Engineer

New to Laserfiche 8.3 is the Web-based Administration Console. It includes all the functionality of the standard Admin Console and more and is poised to become the primary administrative interface for Laserfiche. Come check out the new tool that is now included with the core Laserfiche installation.

**EDM103: Using the Laserfiche Administration Console (lab)**

Instructor: Jake Martinson, Presales Engineer

New to administering Laserfiche 8? This course covers what you need to know to get a repository up and running from an administrative perspective. Attendees will work with both the traditional Administration Console and the new Web Administration Console.

**EDM104: Basic Laserfiche Troubleshooting**

Instructor: Steve Yaguchi, Software Support Engineer

When you run into a problem with Laserfiche, it's most likely something simple that you can figure out and fix yourself. However, if you need help, the best thing you can do is gather all the relevant information to solve your problem as quickly as possible. This class will teach you where to collect information and how to interpret it at a basic level as well as general Client/Server troubleshooting skills.

**EDM105: Licensing in Rio and Avante**

Instructor: Catherine Ramos, Director of Operations

Having trouble figuring out how Public Portal or Audit Trail licensing work? Need to set up a backup system? This presentation will discuss the licensing implementations for setting up and expanding a Laserfiche system.

**EDM106: Coming Attractions in Laserfiche**

Instructor: Laserfiche Development Staff

Join various Laserfiche software engineers and software test engineers as they show off new and exciting features being worked on for future versions of Laserfiche, including an online forms component and improvements to our mobile applications. Please note: these are demonstrations of future capabilities and are not yet scheduled to be part of any specific release.

**EDM107: Requirements Gathering**

Instructor: Margaret Rogers, Solutions Engineer

**EDM201: Tips and Tricks for Administrators**

Instructor: Jeanie Conner, Software Test Engineer + Justin Pava, Software Release Manager

Already have the basics of the Admin Console down? Come learn tips and tricks to keep your repository humming and make administrative tasks smoother.

**EDM202: Doing More with the Administration Console (lab)**

Instructor: Jake Martinson, Presales Engineer

Have the basics of repository administration down? Go beyond the basics to learn what you can do with the Admin Console, such as pushing out user attributes, setting up custom views and configuring data checksums. This presentation will give you more tools to run your system effectively.

**EDM203: Repository Design Essentials**

Instructor: Ege Ersoz, Presales Engineer

Join us to discuss best practices for repository structure, folder and document naming conventions, and metadata use that will yield a clean and efficient repository that is easy for your organization's staff to use. This course provides guidelines for using automation and other tools to create a good structure during setup and also offers strategies for reorganizing a system that has outgrown its original design.

**EDM204: Best Practices for Installation and Configuration**

Instructor: Nicole Medina, Solutions Engineer

Properly installing and configuring your Laserfiche software is a critical first step in deploying a solution that will meet your needs. This class will cover the environmental factors—supporting hardware, software and network infrastructure and Laserfiche components—you need to consider before you begin your installation. It will also provide best practices based on lessons learned from deploying Laserfiche for a wide variety of customers.

**EDM205: Deploying Avante and Rio**

Instructor: Ege Ersoz, Presales Engineer + Justin Pava, Software Release Manager

New to Laserfiche Avante or Rio? You may have questions about licensing, configuration, using Windows Accounts, and more. This presentation will cover practical considerations for those who will be rolling out a new system or converting from Team or United.

**EDM206: Performance Analysis and Strategies**

Instructor: Mitchell Cao, Technical Manager + Huong Nguyen, Software Test Engineer

Ensuring your Laserfiche solution meets your performance requirements is as important as the way you've designed your solution and requires the same level of attention. Whether you're planning your initial implementation, replacing hardware or adding additional departments, this class will help you analyze system usage and performance counters, identify areas of concern and develop strategies for achieving your desired level of performance.

**EDM207: Backup and Recovery**

Instructor: Ege Ersoz, Presales Engineer

When you entrust your content to Laserfiche, you want to be sure it will be available for its entire lifecycle no matter what happens. The only way to do that is to make sure you're backing everything up correctly and you know how to quickly restore from backup. This course will teach you how to identify exactly what needs to be backed up, provide strategies to perform the backup efficiently and how to restore so your information is back online as quickly as possible.

**EDM208: Database Tuning and Maintenance**

Instructor: David Chen, Manager of IT

Laserfiche relies heavily on the backend database to perform a variety of functions, so making sure your database is performing well is an important step in ensuring your overall Laserfiche solution is performing as expected. This course provides an overview of the different ways Laserfiche usage impacts the database and provides strategies, from hardware recommendations to configuration options, to optimize performance based on your specific needs.

**EDM209: Effective Reporting Strategies**

Instructor: Steve Hackney, Lead Sales Engineer

Your Laserfiche repository contains a great deal of data about the documents it manages, especially if you're also collecting data via Audit Trail. This session gives you an understanding of where that data lives, what you can do with it, and what's so valuable about it. Find out how to generate reports that will help you streamline processes, use your system more efficiently, and make better-informed decisions.

**EDM210: Troubleshooting Web Products**

Instructor: Mike Wu, Software Test Engineer + Ken Leung, Software Engineer

Installing and configuring Laserfiche Web products requires that a number of environmental factors are in place and configured correctly. This course covers the common issues that people run into when implementing WebLink and/or Web Access and includes a narrative of the process required to prepare and configure the environment, as well as guidance for configuring Windows Authentication with Kerberos.

**EDM211: Laserfiche Server Troubleshooting**

Instructor: Shule Wong, Software Support Engineer

This course picks up where the Basic Troubleshooting course ends. Starting with an overview of the Laserfiche Server architecture and how it interacts with other products, you will learn how the Server works and use that knowledge to identify and resolve problems.

**EDM212: Mystery Solved: Troubleshooting Case Studies**

Instructor: Alex Huang, Manager of Technical Support + Margot Uyan, Escalation Manager

Troubleshooting is often described as "chasing a rabbit down a hole," and often when you identify the source of a problem, it's not what you thought it would be. The escalation team from Laserfiche Technical Support will present a number of the most complicated support cases as a way to show how they get to the root of problems and how complex the interaction between the components of a Laserfiche solution really are. These case studies will cover a variety of issues and would be useful for any seasoned system administrator, support engineer or "troubleshooting geek."

**EDM213: Laserfiche SDK Overview**

Instructor: Kevin Bell, Presales Engineer + Roger Wu, Technical Writer

Laserfiche provides a number of ways to access the system programmatically, and it can be difficult to decide which tools are right for the job. This course will provide an overview of what tools are available across the product suite, what they can do and when it makes sense to use them. This course is good technical complement to *CD205 Effective Integration Strategies*.

**EDM214: Get Started Using the Laserfiche .NET SDK**

Instructor: Jonathan Powers, Technical Writer

The Laserfiche SDK includes .NET libraries, and using them is different than working with the Laserfiche Server Objects. This course will help you get started by teaching the fundamental concepts of building an integration with the .NET libraries, with particular focus on areas where it's simpler to use than LFSO.

**EDM215: Hands-On with the Laserfiche License Manager (lab)**

Instructor: Ege Ersoz, Presales Engineer + Jeanie Conner, Software Support Engineer

Looking to roll out a Rio system? The License Manager is the central component used to activate the Laserfiche Server—whether production, test or backup servers. This presentation will cover Active Directory options, best practice recommendations and more.

**EDM251: Enterprise Deployment Strategies**

Instructor: Nitin Savant, Solutions Engineer

“Enterprise” can mean different things to different people: large user populations, high-volume transaction processing, integration with multiple applications or a combination of all of those. Regardless of your definition, enterprise deployment requires meticulous planning, thorough analysis and continuous testing. This course provides strategies for making your enterprise deployment go as smoothly as possible, using lessons learned to help you do things right.

**EDM252: Customizing Web Access**

Instructor: Jonathan Powers, Technical Writer + Ken Leung, Software Engineer

The Laserfiche Web Access interface can be customized to meet the needs of your organization, from modifying context menus and adding custom processes, to hiding options that won't be used. This course will discuss real-world customer needs for customization, how they can be met, and what options are supported by Laserfiche. Familiarity with ASP.NET will be beneficial.

**EDM301: Best Practices for Secure Deployment**

Instructor: Jonathan Kim, Solutions Engineer

Deploying a secure solution extends beyond the way you configure security within Laserfiche. Depending on your system, there can be a number of environmental factors you must address, such as securing the file server(s) and communication between clients and servers. This course picks up where Laserfiche security leaves off, explaining the way Laserfiche components interact with their hardware and with each other, and provides strategies for making sure your entire system is secure.

**EDM302: ERP Integration Strategies**

Instructor: Andrew Brown, International Territory Manager + Johnny Xie, Software Engineer

ERP and ECM solutions should have a symbiotic relationship: the ERP system creates content that should be ingested by the ECM system, and the ECM system captures unstructured content that supports the transactions governed by the ERP system. Both systems can be utilized to automate parts of the same business process. This course uses the integration between Laserfiche and SAP to highlight the way these two seemingly disparate systems can be made to work closely together.

**EDM303: Advanced Applied SDK**

Instructor: Robert Strickland, Software Engineer + Gordon Wong, Software Engineer

As expected, most organizations utilize the Laserfiche SDK to develop integrations and custom programs on top of the Laserfiche platform, but there are other useful ways to utilize the functionality it provides. This course will focus on non-traditional applications of the SDK, such as automatically monitoring and optimizing the health of your Laserfiche system.

---

**Capture and Classification****CC102: Introduction to Metadata**

Instructor: Linda Ding, Education Program Strategist + Scilla Bennett, Technical Writer

Metadata is one of the building blocks that makes your Laserfiche system useful. This course will introduce you to the many ways you can add information to your documents in order to organize and work with them more efficiently. In addition to the types of metadata available in your repository, you will learn how you can adapt and use metadata in a variety of ways to fit your needs.

**CC104: Capture Strategies**

Instructor: Brett Hickenbotham, Presales Engineer

Laserfiche offers a variety of tools and a number of methods for gathering the information coming into your organization in an efficient manner and making it available to everyone who needs it. This course will help you better define your capture needs and determine the best capture strategy possible.

**CC106: Scanning in Laserfiche (lab)**

Instructor: Brett Hickinbotham, Presales Engineer

You can't use Laserfiche effectively if you can't get your documents into the repository. This class demonstrates how to use the Laserfiche Scanning component to scan in, clean up, and properly index documents you want to store. By the end of the session you will have learned how best to use both scanning modes to bring documents into your Laserfiche system so you can efficiently retrieve and work with them later on.

**CC108: Introduction to Quick Fields**

Instructor: Daniel Won, Solutions Consultant + Steve Yaguchi, Software Support Engineer

(Presentation version of CC110.) Laserfiche Quick Fields is an automated capture solution that simplifies the collection and storage of documents and improves the efficiency of data entry. This course will cover what Quick Fields is, what it can do for your organization, and how to get started working with it.

**CC110: Introduction to Quick Fields (lab)**

Instructor: Jake Martinson, Presales Engineer

(Lab version of CC108.) Laserfiche Quick Fields is an automated capture solution that simplifies the collection and storage of documents and improves the efficiency of data entry. This course will give you hands-on experience with what Quick Fields is, what it can do for your organization, and how to get started working with it.

**CC112: Working with PhotoDocs**

Instructor: Brett Hickinbotham, Presales Engineer

PhotoDocs is designed to capture content for import into Laserfiche using a digital camera. This can be especially valuable for large-size or fragile documents it may not be possible to scan or for use on-the-go. The discussion will include both desktop and iPhone uses of PhotoDocs, including likely scenarios where PhotoDocs is the only possible capture solution.

**CC202: Capture Workflow**

Instructor: Ege Ersoz, Presales Engineer

The goal of capture workflow is to do more than merely update individual steps in your existing capture processes for improved efficiency. Instead, the greatest benefits to an organization come from examining a process from start to finish to create a capture strategy that is more efficient, requires less oversight, and forms an integral part of the content management system. The course will introduce the capture workflow philosophy and the Laserfiche tools that will help you achieve maximum gains.

**CC204: Best Practices in Quick Fields**

Instructor: Jonathan A. Kim, Presales Engineer

(Presentation version of CC206.) This course will help users with foundational knowledge of Quick Fields get to the next level by learning how to maximize the efficiency, accuracy, and speed of Quick Fields sessions. Topics covered will include tips and tricks, pre-processing options, pattern matching, multiple zones in one process, and more.

**CC206: Best Practices in Quick Fields (lab)**

Instructor: Kevin Bell, Presales Engineer

(Lab version of CC204.) This course will help users with foundational knowledge of Quick Fields get to the next level by learning how to maximize the efficiency, accuracy, and speed of Quick Fields sessions. Attendees will get hands-on experience with tips and tricks, pre-processing options, pattern matching, multiple zones in one process, and more.

**CC208: Roundtable on Capture Strategies**

Instructor: Laserfiche Staff and Customers

Join our panel of technical and business-implementation experts to go beyond tips, tricks, and product basics. We'll take audience questions about capture strategies for Laserfiche, including best practices, useful workarounds, common mistakes and how to correct them, and new product features.

**CC210: Roundtable on Metadata Design and File Plan**

Instructor: Laserfiche Staff and Customers

Join our panel of technical and business-implementation experts to go beyond tips, tricks, and product basics. We'll take audience questions about metadata design and file plan implementation in Laserfiche, including best practices, useful workarounds, common mistakes and how to correct them, and new product features.

**CC212: Roundtable on Resolving Common Capture Issues**

Instructor: Laserfiche Staff and Customers

Join our panel of technical and business-implementation experts to go beyond tips, tricks, and product basics. We'll take audience questions about resolving common capture issues in Laserfiche, including best practices, useful workarounds, common mistakes and how to correct them, and new product features.

**CC302: Advanced Quick Fields**

Instructor: Evenly Crofts, Project Manager

This course is designed for intermediate to advanced users of Laserfiche Quick Fields who are looking for ways to improve Quick Fields sessions. In particular it will focus on lesser-known features that can dramatically improve the quality and effectiveness of your sessions, including Quick Fields Agent, custom lookup queries, pattern matching, customizing metadata, document merging, the Find Documents pane, and more.

**CC304: Scripting in Quick Fields 8**

Instructor: Jonathan Powers, Technical Writer

The Quick Fields 8 Script Editor offers a powerful and flexible way to customize a session and extend the software's functionality. This class shows you what you can do with this powerful feature by presenting a conceptual overview as well as project examples with code samples. Programming experience is helpful, but not required.

**Business Process Management**

---

**BPM101: Introduction to Workflow**

Instructor: Evan Anderson, Solutions Consultant + Sarah Seene, Technical Writer

What is Laserfiche Workflow? What can it do for you? This course will answer these questions and expand your knowledge of Workflow's capabilities. You'll learn how business process automation can help offices both large and small operate more efficiently.

**BPM102: Defining and Diagramming Business Processes**

Instructor: Kacy McKibben, Solutions Engineer

The most efficient approach to automating business processes starts with asking the right questions, doing a thorough needs analysis, and creating an initial design or specification. Up-front planning that includes breaking down your business processes into finite steps, will put you on the right path for a successful and efficient implementation. This session provides best practices for defining the steps of a process and documenting them in a format that can be translated into Laserfiche-related processes, such as Quick Fields sessions and Workflow rules.

**BPM103: Getting Started with Workflow (lab)**

Instructor: Brett Hickinbotham, Presales Engineer

What is Laserfiche Workflow? What can it do for you? This course will answer these questions and give you hands-on knowledge of Workflow's capabilities. You'll learn how business process automation can help offices both large and small operate more efficiently.

**BPM104: What's New in Workflow 8.3**

Instructor: Edwin Pahk, International Territory Manager + Sarah Seene, Technical Writer

This course will introduce you to the new features and functionality in Laserfiche Workflow 8.3. The new version offers dozens of new activities, an expanded administration console, enhancements to the Workflow engine, and new reporting capabilities.

**BPM105: Tips and Tricks in the Workflow Designer**

Instructor: Jacob Seene, Software Engineer

Learn a variety of tips and tricks to use the Workflow Designer more efficiently, customize the user interface, and build workflows faster. We will also provide an opportunity for you to give us your feedback and ideas for future usability enhancements. Attendees should be somewhat familiar with the Workflow Designer.

**BPM151: The Power of Tokens in Workflow**

Instructor: Flavio Kuperman, Software Engineer

This course will survey the range of possibilities for using tokens in Laserfiche Workflow to increase the flexibility of your workflows and help you solve problems faster. It will start with how to incorporate tokens into your current workflows, and also cover redesigning and simplifying your current processes with tokens and building new processes with tokens, allowing you to do more, faster.

**BPM152: Intermediate Workflow Design**

Instructor: Sarah Seene, Technical Writer + Matt Ross, Software Test Engineer

(Presentation version of BPM153.) Go beyond the basics of Laserfiche Workflow. Learn the ins and outs of slightly more complicated Workflow activities, as well as how and when to use them. Specific activities covered will include Parallel, Conditional Parallel, Search, the Find and For Each series, and more.

**BPM153: Intermediate Workflow Design (lab)**

Instructor: Paul Lee, Presales Engineer

(Lab version of BPM152.) Go beyond the basics of Laserfiche Workflow. Learn the ins and outs of slightly more complicated Workflow activities, as well as hands-on experience of how and when to use them. Specific activities covered will include Parallel, Conditional Parallel, Search, the Find and For Each series, and more.

**BPM201: Enterprise Workflow Activities**

Instructor: Jonathan A. Kim, Presales Engineer

New activities have been added to Laserfiche Workflow 8.3 to extend the software's functionality by helping leverage existing forms and integrate with other systems. This course will take an in-depth look at PDF activities and the enterprise integration library (data activities). Participants will explore what's possible with the activities, potential use cases, their value to an enterprise, and the benefits of real-time integration.

**BPM202: Workflow Best Practices**

Instructor: Matt Ross, Software Test Engineer + Jonathan A. Kim, Presales Engineer

(Presentation version of BPM203.) This course is for anyone who builds workflows and wants to build better ones that are easier to troubleshoot and reuse. Content will include general principles and guidelines for workflow construction, how to translate a Visio diagram to Laserfiche Workflow, and examples of common mistakes.

**BPM203: Workflow Best Practices (lab)**

Instructor: Paul Lee, Presales Engineer

(Lab version of BPM202.) This course offers hands-on experience for anyone who builds workflows and wants to build better ones that are easier to troubleshoot and reuse. Content will include general principles and guidelines for workflow construction, how to translate a Visio diagram to Laserfiche Workflow, and examples of common mistakes.

**BPM204: Troubleshooting Workflow**

Instructor: Ege Ersoz, Presales Engineer

This session will give you the background information to help you diagnose the types of problems you might encounter with Laserfiche Workflow. It will cover how the different parts of the product work together, what the built-in troubleshooting tools are and how to use them, and what to do with the information they gather. Specific topics will include the new Workflow Configuration Manager and the greatly expanded Workflow Administration Console.

**BPM205: Activity-Based Integration**

Instructor: Steve Hackney, Lead Sales Engineer

The primary reason organizations look to integrate Laserfiche with other systems is to share information, but the integration is only useful if the information is kept accurate and up-to-date. Developing integrations that are triggered by system activity can ensure information shared between systems remains synchronized and is updated when necessary. This course will use the most common types of Laserfiche integration projects to show how an activity-based approach might provide more benefit.

**BPM206: Optimizing Workflow Performance**

Instructor: Ed Heaney, Software Engineer

Users of any software want it to run at peak performance, speed, and efficiency, and users of Laserfiche Workflow are no exception. This course will cover ways to make Workflow run better, including such topics as different optimization options and their tradeoffs and risks, starting rule performance, scheduled workflows, work queues, Workflow architecture, and more.

**BPM207: Enterprise Deployment of Workflow**

Instructor: Fei Wang, Solutions Engineer

This course will cover considerations for deploying Laserfiche Workflow to a large organization, presented by Laserfiche staff who have hands-on experience doing so. Topics will include strategies and new Workflow functionality that make the deployment process faster and more efficient. This course will demonstrate how better planning and expectations will yield better overall results.

**BPM208: Roundtable on Workflow**

Instructor: Laserfiche Staff and Customers

Join our panel of technical and business-implementation experts to go beyond tips, tricks, and product basics. We'll take audience questions about popular topics in Laserfiche Workflow, including best practices, useful workarounds, common mistakes and how to correct them, and new product features.

**BPM221: Debugging Workflows**

Instructor: Miruna Babatie, Software Test Engineer

The purpose of this course is to help Laserfiche Workflow users not only find and solve their own issues with a workflow design, but also anticipate and avoid problems during the building process. Attendees will learn what the major steps of troubleshooting a Workflow design are and how to build activities into a workflow that help troubleshoot it while it's in production.

**BPM251: Introduction to Workflow Scripting**

Instructor: Flavio Kuperman, Software Engineer + Jacob Seene, Software Engineer

Learn about the Laserfiche Workflow scripting activities, what they can do for you, when you should use them, and why they're even better in Workflow 8.3. Attendees should have some VB .NET programming experience and an intermediate-level knowledge of Laserfiche Workflow.

**BPM252: Introduction to the Workflow SDK**

Instructor: Carl Sykes, Software Engineer

The new Laserfiche Workflow SDK allows developers and integrators to extend Workflow functionality. This course will introduce the new API and explore possible uses, including the ability to use Workflow independent of a Laserfiche repository and creating custom reports specifically tailored to your business process.

**BPM301: Extending Workflow, Introduction to Custom Activities**

Instructor: Jonathan Powers, Technical Writer

(Presentation version of BPM302 and BPM303.) In addition to the scores of out-of-the-box activities included in Workflow 8.3, you can extend the software using scripts and custom activities. This course will provide an overview of this process, complete with code samples and best practices. It is aimed at those familiar with basic Laserfiche Workflow concepts, but with little to no experience extending the software. Programming experience is helpful, but not required.

**BPM302: Extending Workflow, Custom Activities Part 1 (lab)**

Instructor: Ed Heaney, Software Engineer

(Part 1 of 2. Lab version of BPM301.) In addition to the scores of out-of-the-box activities included in Workflow 8.3, you can extend the software using scripts and custom activities. This hands-on lab will cover how to create a custom activity and install it on the Laserfiche Workflow Server and Designer. Customization is covered in BPM303.

**BPM303: Extending Workflow, Custom Activities Part 2 (lab)**

Instructor: Carl Sykes, Software Engineer

(Part 2 of 2. Lab version of BPM301.) In addition to the scores of out-of-the-box activities included in Workflow 8.3, you can extend the software using scripts and custom activities. This hands-on lab will cover how to customize a custom activity's user interface, how to use tokens in the activity, and more. Custom activity creation is covered in BPM302.

**BPM304: Expert Workflow Concepts**

Instructor: Miruna Babatie, Software Test Engineer

This course is designed for expert users of Laserfiche Workflow, and will cover a variety of new, detailed activities that require careful configuration to yield great benefit to organizations. Attendees will learn what the new activities are, when to use them, and how to distinguish them from each other. Specific activities covered include Deadlines, Escalations, Replicate Entries, Invoke Workflow, and more.

**BPM351: Advanced Custom Activities**

Instructor: Ed Heaney, Software Engineer

Now that you're creating custom activities to extend your Workflow implementation, learn best practices for making them efficient and effective. Attendees will discuss concepts, common mistakes, and tips for good workflow and activity design.

**Value Added Reseller****VAR101: Marketing, Selling and Providing Laserfiche ECM Solutions for Government Organizations**

Instructor: Kimberly Samuelson, Director of Government Marketing

Year over year SLG is Laserfiche's most innovative vertical. Join us to learn how to target, market, pitch and close in this lucrative market.

**VAR102: Laserfiche Rio: Messaging, Competitive Advantages and Sales Strategies**

Instructor: Kimberly Samuelson, Director of Government Marketing + Jereb Cheatham, Director, Laserfiche Institute  
Laserfiche Rio was designed as an ECM situation that should be implemented as a foundational component of an organization's technical architecture. The flexible licensing model, integrated architecture, bundled functionality and choice of interface allow it to be deployed as a platform upon which targeted business applications can be built. Positioning solutions this way requires a different perspective, and this course will provide an overview of the messaging and competitive advantages you will need to master in order to be successful.

**VAR103: Marketing, Selling and Providing Laserfiche ECM Solutions for Institutions of Higher Education**

Instructor: Linda Ding, Education Program Strategist  
Year over year SLG is Laserfiche's most innovative vertical. Join us to learn how to target, market, pitch and close in this lucrative market.

**VAR104: Harness the Incredible Opportunity of the Independent Advisor Marketplace**

Instructor: Linda Kao, International Marketing Strategist + Tim Welsh, Laserfiche Senior Consultant  
With the recent meltdown in Wall Street and investor dissatisfaction with traditional advice, the independent financial advisor marketplace is expected to grow dramatically over the next decade. Join us for an engaging session with independent advisor market expert Tim Welsh, who will detail the nuances of how VARs can effectively sell ECM into this fast-growing vertical.

**VAR105: Licensing in Rio and Avante (VAR only)**

Instructor: Catherine Ramos, Director of Operations  
Having trouble figuring out how Public Portal or Audit Trail licensing work? Need to set up a backup system? This presentation will discuss the licensing implementations for setting up and expanding a Laserfiche system.

**VAR106: Make Your Meetings More Productive**

Instructor: Jereb Cheatham, Director, Laserfiche Institute  
When a customer invites you for a meeting, you have to take advantage of the opportunity and make the most of the time they've given you. Instead of presenting your "long and winding road" slide deck, you should assemble focused materials, send the information ahead of time and spend your meeting discussing next steps. This course will use strategies we've developed over the last year to sharpen our message, document our recommendations and provide a roadmap for moving forward.

**VAR107: Laserfiche Marketing Resources**

Instructor: Melissa Henley, Marketing Manager  
Get the most from your marketing resources! From Laserfiche-branded collateral to direct mail, awards, PR and more, you have access to the tools you need to sell smarter. In this interactive course, you'll learn how to use Laserfiche marketing resources more effectively.

**VAR108: Building Long-Term Customer Relationships**

Instructor: Sean Tang, VP of International Business  
For customers, adapting to evolving business needs requires more than just a one-time technology purchase. Consultative selling, enterprise focus and LSAP—which provide customers with constantly updated technology, preventative maintenance and training—are the foundation of long-term customer relationships. Using Laserfiche Mobile as an example, this course will provide an overview of the messaging and competitive advantages you will need to master in order to be successful.