Getting Started with Laserfiche Workflow Designer
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Introduction

Welcome to Laserfiche Workflow!

This quick start guide will help you begin using the most common Laserfiche Workflow features. You can get more information from the additional resources listed at the end of each section. Certain resources listed in this guide require a free Laserfiche Account to access. Those resources are marked with an asterisk (*)

You can create the free account [here](#).

The terminology in these sections is defined at the end of the guide.
Chapter 1

Workflow Overview
Workflow Overview

Laserfiche Workflow consists of two modules:
- The Workflow Designer
- The Workflow Administration Console

This guide focuses primarily on the on-premises Workflow Designer. Most of the information mentioned here is also applicable to Workflow on Laserfiche Cloud. To get more detailed information about Workflow and Laserfiche Cloud, see the Laserfiche Cloud help files. To get more information about the Workflow Administration Console, see the Laserfiche Workflow help files.

Signing in

You can sign in to the Laserfiche Workflow Designer using one of the following methods:
- A specific username and password provided to you by your IT department
- Your Windows login credentials

If you do not have access to the Workflow Designer, contact your Laserfiche Administrator.
Before Creating a Workflow

Before you begin designing a workflow, it is important to diagram your business process to ensure that it is as simple, logical and consistent as possible. Here are some resources to assist you with this process.

How to Diagram Your Business Process
Learn More

3 Steps for Optimizing Business Processes
Learn More

Rework an Existing Business Process with Capture Workflow
Learn More

Building Laserfiche Workflows Online Training Course
Learn More
Chapter 2
Creating a Workflow
Once you have diagrammed your business process, it is time to transfer this information onto the Workflow canvas. The main Workflow Designer interface consists of the **Toolbox**, the **Designer Pane** (or canvas), and the **Properties pane**.

Additionally, you can switch to the **Rule Manager** pane to view the starting rules associated with the workflows, and the **Search pane** to search for running workflow instances.

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*The Laserfiche Workflow Designer*
The Process Automation Designer
Video: Getting Started with the Workflow Designer

Video: Getting Started with Workflow in Cloud
Chapter 2: Creating a Workflow

**Connection Profile**

To allow your workflow to interact with the Laserfiche repository, you must first set up a connection profile. Navigate to the **Connection Profiles** section of the Properties pane and click on "Manage workflow connection profiles" to set up your profile. More information about setting up a connection profile can be found in the help files.

*Creating a new connection profile*
Activities

A workflow definition is a series of configured steps, known as activities. You can use activities to route files, send email notifications, insert information into a database, and more. To add an activity to the canvas, select it in the Toolbox and drag it over. You can also double-click the activity. Once you’ve added the activity, configure its properties in the Properties pane.

The Workflow Designer Toolbox

Configuring the properties of an Email activity
**Video:** Using the Toolbox in Laserfiche Workflow

**Video:** Creating a Workflow in Cloud
Types of Activities

Activities are divided into the following groups:

- Routing Activities
- Laserfiche Actions
- Laserfiche Metadata
- Flow Control
- Repeating
- Information Gathering
- Token Creators
- Enterprise Integration
- Workflow Actions
- Business Process
- Integration with Exchange Servers
- Integration with SharePoint Sites
- Laserfiche Forms

You can see a full list of activities and a description of each in the Laserfiche Workflow help files.

Some of the most popular activities include:

Assign Field Values: add metadata to a document or folder

Deadline: set a deadline for a particular task

Email: send an email notification

Escalation: perform a series of actions if a deadline is not met

For Each Entry: loop through a set of documents and folders

Insert Data: populate an external database with information

Parallel: perform a series of actions simultaneously

Query Data: look up information in a database based on a criterion, such as the value of a template field
Retrieve Field Values: pull the template field values from a document or folder

Retrieve Business Process Variables: retrieve the content of a Laserfiche form submission

Routing Decision: perform an action based on a series of preset conditions, such as routing a document or folder to a different area of the repository based on particular criteria

Search Repository: perform a search of the repository

Wait for Entry Change: wait until a user performs a particular action before continuing

Video: Conditional Decision and Conditional Parallel Activities in Workflow
**Video:** For Activities in Workflow

**Video:** Enforcing Deadlines with Workflow
Tokens

Tokens are placeholders for a particular value. You can configure file names, folder structures, metadata etc. to include one or more tokens. Many activities produce one or more tokens that can be used in the rest of the workflow. This allows for greater flexibility when designing workflow definitions.

For example, each field in a template has a token associated with it. If your template has a field named Vendor, you can configure your workflow definition to save this entry in a folder corresponding to the vendor name by adding the Vendor token in your file path.

Token names are formatted in the following way: `%{activityName_token name}` and can be accessed by clicking this button:

![Using the Vendor token to configure the entry's file path](image)
Tokens can either have one value, or multiple values. The value of a token can be edited or formatted through the Token dialog. This dialog is accessed using the token button when configuring an activity. More information on editing and formatting tokens can be found in the Laserfiche Workflow help files.

*Token dialog*
Video: Using the Token Editor in Workflow

White Paper: Tokens in Laserfiche Workflow
**Parameters**

You can also set up your workflow to produce tokens. These tokens, called parameters, can then be passed on to another workflow. This helps with your business process flow, by seamlessly linking multiple workflows together. More information about Workflow parameters can be found in the Laserfiche Workflow help files.
Workflow Business Processes

A Laserfiche Workflow business process is an enhanced workflow definition that offers extensive reporting and can be manually started in the Laserfiche Windows or web client. Business processes are built and published in the same way as workflows.

A Workflow business process allows the administrator to configure instructions for users. When a user is assigned a new document or folder to work with, he can click on the entry to view its history and see exactly what he has to do.

Some examples of business processes include invoice review or contract review and approval. Basically, any process where a document is passed to many different people who need to perform some action on it, would make a good business process.

To change a workflow into a business process, select the appropriate box in the Properties pane.
**Business Process Rules**

If your workflow has been converted to a business process, you can configure a business process rule. A business process rule defines when the business process is allowed to be started by users in the Laserfiche client applications. You will be prompted to create this rule when publishing a business process. Note that you have to configure a business process rule only if your business process will be manually started by users.

*Business Process Rule dialog*
Video: Turning a Laserfiche Workflow into a Business Process

Video: Business Process Rules

White Paper: Introduction to Business Processes

Article: How to Create a Basic Business Process with Laserfiche Workflow
Workflow and Laserfiche Forms

Laserfiche Workflow can also pass information to Laserfiche Forms, and vice versa. You can start workflows from within Forms, and launch Forms processes from Laserfiche Workflow. By passing information between Workflow and Forms, you can take advantage of the additional functionality that each product possesses.

In order to use Forms with Workflow, you must configure Forms to communicate with the Workflow server. More information about this can be found in the help files.

Error Processing

The Workflow Designer has many built-in functions to help you catch errors in your workflow definition.

- **Canvas validation** checks for improperly configured activities. Misconfigured activities will show a red error warning on the canvas, along with information about the error.
- In order to test a particular section of a workflow, it is easy to **disable certain activities** so that they don’t run.
- The **Undo/Redo buttons** allow for quickly undoing or redoing changes.
- The **Run Current Workflow button** lets you run the workflow definition on a sample entry and provides specific instance details to help you catch errors. More information about this is found in the Searching section of this document.
Canvas validation shows that the Generate WebLink URL's activity has not been configured properly

The Assign Token Values activity has been disabled

Undo and Redo buttons

Best Practices for Creating a Workflow Definition

- **Rename activities** to be more intuitive and add specific descriptions to each. This will make the workflow definition easy to understand for anyone who looks at it.

- **Add a third branch to routing activities** to account for neither condition being satisfied. This branch can include an Email activity that notifies an administrator to look into the issue.

- **Break large workflows into multiple, separate workflows.** This can make the processes easier to understand and edit. It also allows you to use certain, generic workflow definitions as building blocks for other workflows, simplifying your workload.

**Article:** [How to Design your First Laserfiche Workflow](#)

**Article:** [How to Create a Basic Business Process with Laserfiche Workflow](#)
Chapter 3

Running a Workflow
Starting Rules

Once you have created a workflow definition, the next step is to configure starting rules. Starting rules define what will invoke this workflow when it is live. Starting rules are grouped into the following types:

- Condition
- Schedule

Workflow can also be invoked by another Laserfiche application such as Forms or Quick Fields. Find more information about passing data from Laserfiche Forms to Workflow in the Laserfiche Forms help files, and information about starting a workflow from Laserfiche Quick Fields in the Laserfiche Quick Fields help files.

Starting rules are configured in the Rule Manager tab. To view them, click on the workflow. You can add a new rule, or edit, delete or disable the current rule.
When adding a new rule, you will be presented with a **Rule Wizard**. You can add either a Condition or Schedule rule, with different options for each. Note that starting rules can be enabled and disabled.

Selecting the **Condition rule** will bring you to a dialog where you can configure the exact rules for triggering your workflow. More information about configuring Condition starting rules can be found in the Laserfiche Workflow help files.

![Configuring a condition starting rule](image)

Selecting a **Schedule rule** will bring you to a dialog where you can configure exactly when the workflow should run. More information about configuring Schedule starting rules can be found in the Workflow help files.

![Configuring a Schedule starting rule](image)

**Article:** [Workflow: Best Practices for Creating Condition Starting Rules](#)
Chapter 3: Running a Workflow

**Video:** Creating a Condition Starting Rule in Workflow

**Video:** Creating a Starting Rule in Cloud

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Video: Using the Workflow Condition Editor

Video: Creating Schedule Starting Rules in Workflow
Best Practices for Creating Starting Rules

- **Exclude the Workflow user** (the Workflow account) in your conditional starting rule. If you fail to do so, you may end up with a runaway workflow – a workflow that never stops running. If you do end up with a runaway workflow, disable the starting rule immediately before making changes to it. This does not apply to Laserfiche Workflow on Cloud.

- **Make your rule as detailed and specific as possible.** Making the rule too vague will result in the workflow running when you don’t want it to.
Publishing a Workflow

Before a workflow can be run or tested, it must be published. Note that if you want to work on the same workflow over time, you must either publish it or save it on your computer. Make sure the starting rules are disabled until your workflow is ready to go live. More information about saving your workflow definition are found in the help files.

Published workflow definitions will appear in the View Workflows dialog as well as the Rule Manager.

The View Workflows dialog shows a list of all published workflow definitions
Testing a Workflow Definition

You can either test the workflow definition by satisfying the Starting Rule conditions or by running it directly from the Workflow Designer. If you select the latter option, you will be prompted to select a document on which to run this workflow. If your workflow is a business process, you can also test it by launching it manually on an entry in the repository.

The Run Workflow dialog

Video: Testing Workflows in Laserfiche
**Searching**

The Search Pane allows you to find workflow instances that have run or are currently running. This can help you catch errors, find runaway workflows or double check that your workflow is running properly during testing. You can make use of numerous search filters and options, including searching by workflow name, start date and time of last action.

*The Search Pane has a list of search filters*
An example of Workflow search results

Double-click a search result to open the workflow in a new tab where you can view details of the workflow instance. More information about workflow instance details can be found in the Workflow help files.

Workflow instance details
Video: Common Searches in Laserfiche Workflow

Video: Workflow Instance Details

Article: Use Laserfiche Workflow to Keep Business Processes Running Smoothly
Sharing Workflows

You can easily share workflows with others in the following ways:

- **Export as image** lets you save a screenshot of the Workflow Designer canvas as an image
- **Export Workflow** allows you to save the Workflow definition and starting rules as a .wfi file
- **Save** lets you save the workflow definition only, without the starting rules, as a .wfx file
- **Workflow Web** lets you share workflow definitions with others through a web portal. More information about Workflow Web can be found in the Workflow [help files](#).
Chapter 4

Common Workflow Examples
Below is a series of videos of common workflow types.

**Video:** Creating a Workflow that Links Related Documents

**Video:** Creating a Workflow that Renames Documents
Video: Creating a Workflow that Synchronizes Metadata

Video: Creating a Workflow with a Deadline
**Video:** Creating an Approval Workflow

**Video:** Use Workflow to Notify Users of Document Changes

You can also download workflow templates from the [Laserfiche Support Site](Laserfiche Support Site).
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Key Terminology
**Activity**

A single, pre-built, configurable step in a workflow definition that interacts with Laserfiche entries, data, or outside sources. Activities are the building blocks of workflow definitions.

**Business Process**

Business processes in Laserfiche Workflow are workflows that provide information to individuals involved in the process via instructions, notifications, and reporting. They can be manually started from the Laserfiche Windows or web client.

**Business Process Definition**

A repeatable pattern of activity built in the Workflow Designer that will interact with entries in a Laserfiche repository, data, or outside sources. A business process definition must be published before it becomes operational.

**Business Process Details**

Located in the Laserfiche Windows and web client, the Business Process Details pane displays information about the current status, step, and history of a business process instance.

**Business Process Instance**

A single occurrence of a business process.

**Business Process Rule**

Similar to a workflow starting rule, the Business Process Rule defines criteria for when a business process is allowed to be run, by a user, in the Laserfiche Windows or web client.
**Business Process Step**
A step is a collection of (zero or more) Workflow activities that accomplish a specific sub-goal of the business process. Steps, and their instructions, are displayed in the Business Process Details pane.

**Laserfiche Entry**
A document, folder, video, image or shortcut stored in a Laserfiche repository.

**Publishing**
The process of storing a workflow definition on a Workflow Server.

**Starting Rule**
A schedule or condition assigned to a workflow definition that defines when it will run. Starting rules can only be assigned to published workflow definitions.

**Workflow Definition**
A repeatable pattern of activity built in the Workflow Designer that will interact with entries in a Laserfiche repository, data, or outside sources. A workflow definition must be published and assigned a starting rule before it becomes operational.

**Workflow Instance**
A specific time a workflow runs.

**Workflow Rule**
A published workflow definition with a starting rule. Workflow rules run when their starting rule is scheduled to run or their starting rule’s conditions are satisfied.
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Additional Resources

Resources marked with an asterisk (*) require a free Laserfiche Account to access. You can create the free account here.

Workflow Videos*

Watch Now

Building Workflows CPP Class

Learn More

Workflow Templates*

Learn More
Join the Laserfiche Community

Laserfiche Answers is a community-driven web forum where Laserfiche users from all around the world share their knowledge and expertise.

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