

## KEY BENEFITS

- Maximize use of SharePoint
- Best-in-class document imaging
- Robust content management
- Document lifecycle management
- Data synchronization and accessibility

# Laserfiche® and SharePoint® Integration

## Extending Microsoft SharePoint® with best-in-class document imaging and content management.

### DESCRIPTION

The Laserfiche® and Microsoft SharePoint® integration (LfSPI) maximizes the strengths of both systems to enhance the utility of your SharePoint solution. While SharePoint adds collaboration portal functionality to Microsoft Office®, Laserfiche provides best-in-class document imaging and content management. By combining the two, users get a complete information management system that allows users to easily and securely work with documents throughout their life cycle.

The two keys to the success of the integration are data synchronization and accessibility. With data synchronization between the two systems, a variety of tasks—such as moving documents, preserving links, limiting copies and removing deleted documents—are handled automatically, without administrative intervention. Thanks to this improved data accessibility, users do not have to know which system stores the document they need.

#### The integration has four aspects:

- Laserfiche Web Part™ for SharePoint
- SharePoint Search Protocol Handler for Laserfiche
- SharePoint Records Center Integration
- Laserfiche Workflow Activities for SharePoint

### LASERFICHE WEB PART FOR SHAREPOINT

The Laserfiche Web Part for SharePoint is key to bringing imaging functionality to collaboration portals in SharePoint. Once the component is added to the SharePoint server farm, it can be added to any SharePoint portal the same way any web part is added. It enables users to browse any part of the Laserfiche folder structure through SharePoint.

The component has a number of parameters that can be defined. One of these is the ability to point the web part to a specific folder in Laserfiche, which makes it easy to include imaged documents in any collaborative process. Suppose a team of people is working on a new contract. It's extremely likely that some of the documents they need to work with are paper, and SharePoint does not offer a simple way to handle scanned paper. Thanks to the LfSPI, however, it's straightforward. On the project portal, add the Laserfiche Web Part and point it to a folder in Laserfiche. Launch Laserfiche scanning directly from a button in the Laserfiche Web Part interface and upload your newly scanned document.



*Documents scanned into Laserfiche are also accessible through SharePoint with the Laserfiche Web Part*



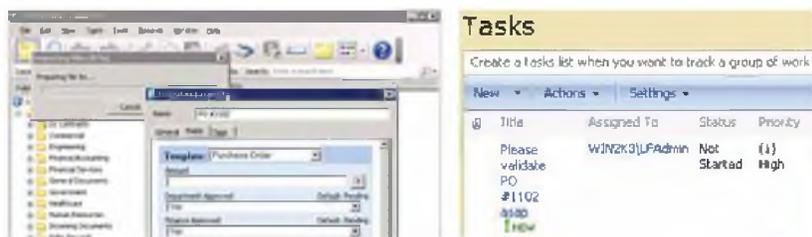
### SHAREPOINT RECORDS CENTER INTEGRATION

Another cornerstone of the LfSPI is the ability to store SharePoint documents in Laserfiche once the collaboration phase is finished.

1. From any document library in SharePoint, a user can bring up the context menu for a document and have it sent directly to Laserfiche. Administrators can configure the integration to automatically pull metadata from the content library into the document's template when it is moved to Laserfiche, without user intervention.
2. To keep the system from generating a copy of a document when it is moved into Laserfiche, users can replace the document in SharePoint with a URL that points to the document's location in Laserfiche. Users can also choose to keep copies of the documents in both systems or delete the document from SharePoint entirely. Because of Laserfiche's tight integration with Windows Active Directory, document security is not compromised at any step in the process.
3. Creating a URL placeholder in SharePoint keeps the data in the two data stores synchronized. One risk of sending a copy of the document into Laserfiche and keeping another in SharePoint is that users could end up making further modifications to the document in SharePoint, so the version in Laserfiche would be out of synch. Moving the document from SharePoint to Laserfiche and replacing it with a link in SharePoint avoids this issue, while also preserving easy access to the document.

### LASERFICHE WORKFLOW EXAMPLE:

Suppose that a purchase order is imported into Laserfiche (below left). Further suppose that this purchase order has received the necessary approvals, meaning the order is ready to ship. Laserfiche Workflow detects this and automatically generates a task in SharePoint.



Here is the newly created task in SharePoint (above right), with a link to the document's location in Laserfiche. With this uniform interface, users can always access documents, regardless of whether they're located in Laserfiche or SharePoint.

### SEARCH PROTOCOL HANDLER FOR LASERFICHE

SharePoint includes the ability to extend its search handler so that it can understand other sources of data, such as a Laserfiche repository. The LfSPI takes advantage of this functionality to allow users to seamlessly search both SharePoint and Laserfiche at the same time, or just search Laserfiche, from the SharePoint interface. Again, the LfSPI makes document access a smooth process that doesn't require the user to know where the document is stored.

### WORKFLOW ACTIVITIES FOR SHAREPOINT

The SharePoint functionality available with Laserfiche Workflow is one of the most exciting aspects of the LfSPI. Not only do Laserfiche Workflow activities enhance synchronization between the two systems, but they also offer possibilities for extending the integration even further.

One activity monitors the Laserfiche repository, so whenever a document is deleted, it checks to see if that document was originally sent from SharePoint. If so, it removes the link from the relevant SharePoint document library, which helps preserve data synchronization between the two systems.

Another activity creates a task in SharePoint on the basis of documents meeting conditions in the Laserfiche repository. For example, you might create a workflow that automatically creates a task in SharePoint when a user receives a fax that is imported into Laserfiche from a fax server. This automation is underpinned by Laserfiche Workflow, which is built on the Microsoft Windows Workflow Foundation™.