One Source Client Conference 2013 Course Descriptions

Presentations, Round Tables, Labs & Success Stores/Alliance Partners

(Computers will be provided in Labs for the first 30 registrants)

Tuesday, March 5:

Session 1 – 10:45-12:00

eForm Options for Laserfiche – Victoria B
Thinking about implementing electronic forms for your Organization? This class is for you! While laserfiche Forms allows you to route, interact with, and manage information through Web-based forms, is it the right choice for your organization?   We explore all of the options available to you – your size & scale are important factors.

Roundtable – Tips & Tricks for Administrators – Victoria C
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 Admin Console, including best practices, useful workarounds, common mistakes and how to correct them, and new product features to be aware of.

Using Laserfiche 9 (Lab) – Blue Ashe
Are you new to Laserfiche or want to put your hands on the slightly different interface? Do you want to be more efficient in your daily usage of the software? Using Laserfiche will cover all the basics of the latest version and some nifty tricks to make your daily experience with Laserfiche more efficient and enjoyable.

Automated Document Capture - Tidewater
Document capture and Scanning is a challenge in any organization. With an array of scanning devices, capture needs and backend content management systems, it is ineffective to settle for multiple applications to accomplish one goal. See how Psigen solutions can handle this situation.

Session 2 – 1:30-2:30:

What's New in version 9 – Victoria B
This course presents an overview of new features in each Laserfiche product, such as changes to the Client, Web Access, Workflow, Mobile, Weblink and the Laserfiche SDK. A specific focus will be the new business processes approach represented by the interaction between Laserfiche Client/Web Access and Workflow, as well as the new Laserfiche Forms module.

Tips and Tricks in the Workflow Designer – Victoria C
Learn a variety of tips and tricks to use the Workflow Designer more efficiently, customize the user interface and build workflows faster. Attendees should be somewhat familiar with the Workflow Designer.

Getting Started with Quickfields (Lab) – Blue Ashe
Get up and running with Quick Fields with this hands-on lab. It will cover the basics of identifying each new document being processed, extracting information from the document, and using that information for naming the document and filling in fields. If you are new to Quick Fields, this is the place to get started.

Reconfiguring your Archived Records to Meet Today's Demands - Tidewater
Durham County IT, Jerry Sawyer, shares his successes in realigning data for a more diverse and enlightened user base to enable faster searching and use of records in the repository.

Open Office – Pebble Beach
One Source Support & Sales Staff will be on hand to provide 1-on-1 assistance to troubleshoot your unique issues, answer questions or provide guidance for your Laserfiche system.

Session 3 – 2:45-3:45:

Business Process Strategies – Victoria B
More and more, organizations large and small are looking to realize efficiency, productivity, and financial gains by automating how you work with information. This course will survey the new offerings in laserfiche that will help you automate your business processes and discuss when to use each Laserfiche feature.

Common Support Issues & How to Fix – Victoria C
Reopening the Image Pane of documents if it has mistakenly been closed, resetting the Scan Engine when it has switched to Universal Capture by mistake, restoring Default Layout of the scan window or exporting folders and contents, Setting User configurations in Snapshot. Setting the basic configurations for the Client.

Best Practices in Quickfields (Lab) – Blue Ashe
This class will focus on helping users with a foundational knowledge of Quick Fields get to the next level by learning how to create more efficient sessions. The methods to be presented will help maximize the accuracy and speed of your Quick Fields sessions. After covering tips and tricks, users will put them into practice by optimizing sessions from real-world case studies.

County Deployment - Tidewater
Join Brad Eudy, IT Specialist of Cabarrus County, to learn how they used an enterprise perspective to deploy Laserfiche ECM over the last ten years. He will also touch on business process improvements such as tax records, DSS Case files and permitting.

Session 4 – 4:00-5:00:

Tips & Tricks- Searching in Laserfiche Client – Victoria B
Find just what you're looking for in Laserfiche. This class 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 OCRed text and many other means.

Roundtable – Financial Advisors – Victoria C

Creating Laserfiche Forms (Lab) – Blue Ashe
In this hands-on lab you'll learn how to create, diagram and configure effective forms that gather the information you need to work within Laserfiche.

Document Capture in Laserfiche using MARS - Tidewater
MARS automates document capture to Laserfiche with masterful efficiency and speed. With powerful tools, MARS can be used for text (ASCII, EBCDIC, HTML) and PDF documents, index user-defined criteria, and import them as PDFs or images to the Laserfiche repository. Join us for a class session in which we explore the tools and abilities of MARS, including:

- Capture of computer-generated files
- Automated file management
- Separation of single text or PDF files into multiple files
- Addition of image overlays
- Automation of indexing and import to Laserfiche
- Archive as PDFs or images
- User-empowering client software
    o Create saved document searches
    o Text searches for multiple documents
    o Convert PDFs to Excel spreadsheets
Find out what MARS can do for your organization!

5:00-7:00 Customer Appreciation Reception – Meet our Staff and Exhibitors - Victoria A

Session 5 – 9:15-10:30:

Advantages of Avante & Rio – Victoria B
If you are still on Laserfiche Team or United Servers, you will want to check out this class. Find out the advantages of moving forward to the newest platforms of Avante and Rio.   Why Change – stop by and find out.

Effective Integration Strategies – Victoria C
Many Laserfiche integrations exist, such as viewing Laserfiche documents from a billing system or health system, updating a student database with Laserfiche metadata and importing content from a mapping system. 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.

Introduction to Designing Business Processes (Lab) – Blue Ashe
This lab will let you explore the new business processes in laserfiche, which allow you to start workflows on a document from the Laserfiche Client or Web Access and report on a workflow's progress (in client, Web Access, and Workflow). This course will specifically focus on configuring the Laserfiche Workflow side of the integration.

The Social Worker's Office To Go - Tidewater
The Old Way: Social workers going on field visits have to haul case files, forms, a camera, an audio recorder, and other equipment and spend hours updating notes and files after a visit. *The Emerging Way*: Using a tablet device, social workers can record interviews, complete electronic forms, access case files, take photographs, and transcribe notes. *The Northwoods Way*: Social workers utilize tablets, integrated with the latest technology to be more efficient than ever before both in the field and back in the office. In this session, Northwoods staff will provide an interactive look into a future focused on leveraging mobile devices in social work for productivity, no matter where workers are. Beaufort County DSS will share its vision that Northwoods' mobile solution will drastically increase efficiency, worker morale and customer service.

Session 6 – 10:45-12:00:

Tips & Tricks in the Laserfiche Client – Victoria B
Learn metadata features, shortcut modifications, keyboard shortcuts and many other time-saving tricks and procedures to help manage documents flexibly and efficiently in the Client.

Hands on Q&A with One Source Tech Support – Victoria C
Bring your questions, problems or ideas for a one-on-one with our tech support team.

Advanced Laserfiche Forms (Lab) – Blue Ashe
Take your knowledge of Laserfiche Forms to the next level. In this session, we will cover best practices for creating and maintaining forms and processes, as well as advanced topics such as using scripting and rules to customize your forms and connecting to Laserfiche Workflow.

Navigating the Document Management Landscape in North Carolina - Tidewater
For human services agencies asked to do more with less, document management systems are an obvious choice to save on tangible costs such as paper and storage. Did you know those same solutions can also skyrocket caseworkers' productivity? In this session, Northwoods will outline how 32 agencies in North Carolina are already using the Compass® suite of products to speed the completion of tasks, improve communication between caseworkers, and ultimately serve more clients.

Session 7 – 1:30-2:30:

Laserfiche in a Mobile World – Victoria B
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 Laserfiche for making your Laserfiche Information mobile, including iPhone and iPad applications, Web Access Light, and Weblink in mobile browsers.

Best Practices in Security – Victoria C
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 changes of mistakes and administrative headaches.

Getting Started with Workflow (Lab) – Blue Ashe
You know what Workflow can do and how it can help your business, and now you're ready to dive in and get your hands dirty. If you have never built a workflow before, this is the place to get started. It covers the basics of working with the Workflow Designer in order to build, publish, and update workflows. It will also cover the basics of troubleshooting a workflow that does not behave entirely as you expect.

Enterprise-Class Integrated Physical Records Management - Tidewater
Infolinx – One technology solution for electronic and physical records management featuring Laserfiche-Integrated physical records management, Federated Searching, and Universal File Plan.

Open Office – Pebble Beach
One Source Support & Sales Staff will be on hand to provide 1-on-1 assistance to troubleshoot your unique issues, answer questions or provide guidance for your Laserfiche system.

Session 8 – 2:45-4:00:

Restructuring your Laserfiche Repository – Victoria B
Want a smoother, slicker, more efficient system? Learn how to structure the repository, name documents and folders, and make sure the repository is easy for people to use. This course provides guidelines for following best practices during implementation and also offers strategies for reorganizing a system that has outgrown its original design.

Roundtable - Backup & Recovery – Victoria C
Are you 100% confident in your backups? Do you have a disaster recovery plan? This class will focus on the steps that can be taken to minimize the effects of an unforeseen disruption in your business, namely designing, implementing, and testing your backup and disaster recovery plans. With a plan in place, you'll know your Laserfiche system is prepared for the next hurricane or hard drive failure.

Intermediate Workflow Designer (Lab) – Blue Ashe
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.

IntegratedCRM (Integrated Content Management – Tidewater
Email Manager from CMA is an integrated solution for correspondence management. With an integrated outlook plug-in, Email Manager tracks and documents critical email conversation seamlessly.

Exhibitors to visit at the conference:
Fujitsu Computer Products
Infolinx
IntegratedCRM
Kodak
Millennial Vision (MVi)
Northwoods
One Source
Panasonic
Psigen
Unitrends

Success Stories:
Cabarrus County
Durham County