NINE PEAKS SOLUTIONS
Your 'Peak' Performance Technology Partner®

PRACTICAL GUIDE

Laserfiche®

Manage information. Automate processes. Work smarter.

A practical introduction to document management, records governance, intelligent capture, AI, integrations, and connected work.

Prepared by Nine Peaks Solutions LLC, a Laserfiche Solution Provider helping organizations plan, implement, secure, and support Laserfiche Cloud and self-hosted solutions.

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Laserfiche® Solution Provider

People | Solutions | Lasting Results

THE NINE PEAKS COLLECTION

Mt. Hood | Peak 1 of 9

One of the nine Cascade peaks that inspired the name Nine Peaks Solutions

Discover the mountains behind our name:
The Mountains

THE INFORMATION CHALLENGE

Information should support the work—not slow it down

Organizations create and receive information in many forms: scanned paper, electronic documents, forms, email, images, audio, video, and data from business systems. When that information is scattered across filing cabinets, shared drives, inboxes, and separate applications, employees spend more time searching, duplicating effort, and reconstructing context.

Laserfiche brings documents, information, and business processes together so content can be captured, organized, found, secured, shared, and managed throughout its lifecycle.

Need Help with Laserfiche or Project Terminology?

If you encounter an unfamiliar term or would like additional information about a concept discussed in this guide, visit the Nine Peaks Solutions **Laserfiche Glossary & Project Terms** webpage for explanations of common Laserfiche features, technology, and project terminology.

> **A modern view:** Document management is the foundation—not the finish line. The larger opportunity is to connect information with the people, processes, policies, and systems that use it.

What Laserfiche can help organizations do

CAPTURE & ORGANIZE
Bring paper, files, forms, and related information into a managed repository.

FIND & USE
Search document text and metadata so authorized users can locate information quickly.

AUTOMATE & CONNECT
Route work, approvals, notifications, and information between people and systems.

SECURE & GOVERN
Control access, maintain history, support auditing, and apply lifecycle requirements.

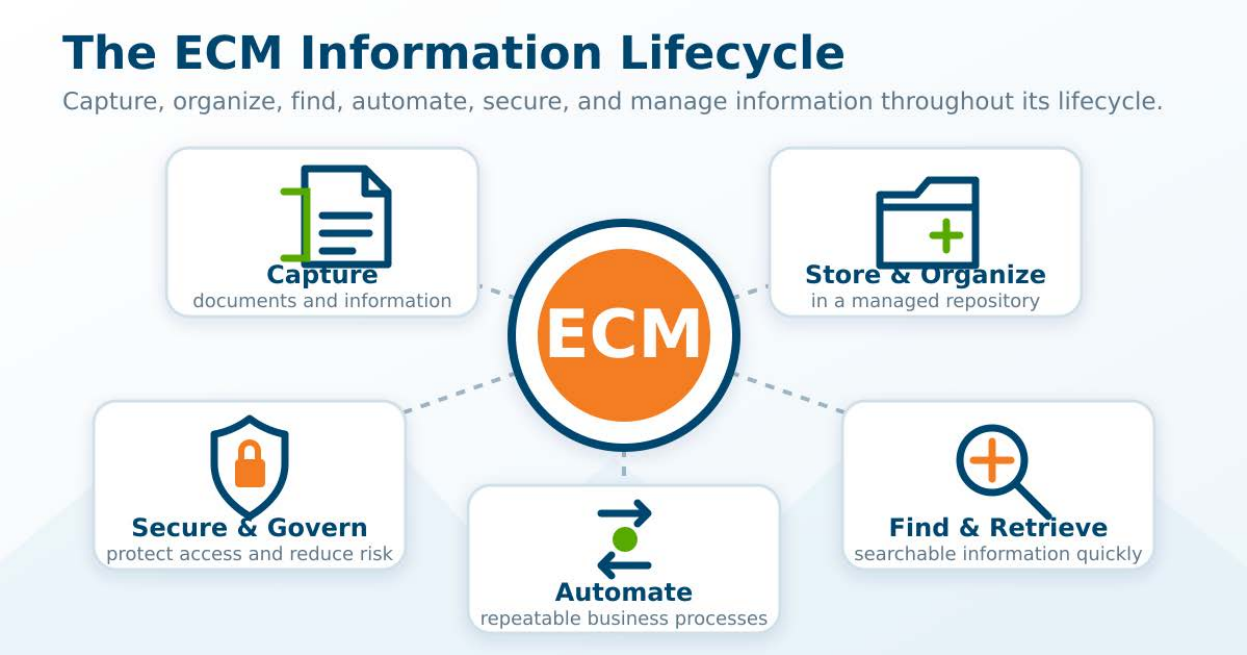
Common starting points

- Replace paper-heavy or email-driven work with electronic capture and routing.
- Make departmental information searchable without creating another uncontrolled shared drive.
- Improve approvals, notifications, handoffs, and status visibility.
- Preserve historical information when a business system is retired or replaced.
- Establish more consistent security, audit, retention, and records practices.

INFORMATION LIFECYCLE

From capture through final disposition

A useful Laserfiche design starts with the entire information lifecycle. The repository is not simply a destination for files; it provides a controlled foundation for search, automation, collaboration, governance, and reuse.



Capture and organize

Information can enter Laserfiche through scanning, electronic upload, forms, integrations, or intelligent capture. Templates, fields, tags, folder structures, and classifications add the context people need to understand and use the content.

Find and retrieve

Users can search document text, metadata, names, dates, and other indexed information. The objective is not merely storage—it is dependable access for the people authorized to use the information.

Manage the lifecycle

Version history, auditing, security, records policies, and disposition controls can help organizations manage information beyond its immediate business use. Requirements should be defined by the organization and configured for its legal, operational, and records obligations.

PROCESS IMPROVEMENT

Turn information into work

Laserfiche can connect documents and data to the actions surrounding them. Electronic forms collect information, workflows route tasks, notifications keep people informed, and integrations reduce the need to re-enter information across systems.

A REPEATABLE PROCESS PATTERN				
1	2	3	4	5
CAPTURE	**CLASSIFY**	**ROUTE**	**ACT**	**RETAIN**
Receive a form, document, or data.	Apply metadata and context.	Send work to the right people.	Review, approve, correct, or complete.	Store the record and apply policy.

Examples

INTERNAL WORK	PUBLIC SERVICE	INFORMATION GOVERNANCE
Invoice and purchase approvals	Public records requests	Records classification
Employee onboarding	Permit or service forms	Retention and disposition
Contract review	Secure document delivery	Audit and access review

Connect information and systems

Laserfiche supports prebuilt integrations, APIs, integration platforms, and custom connectors. The right approach depends on the source system, information exchanged, security model, transaction volume, and operational ownership.

> **Design principle:** Automating a weak process can make the weakness move faster. Begin by clarifying the outcome, roles, exceptions, approvals, and information requirements—then configure the technology.

SECURITY AND GOVERNANCE

Protect information according to business need

Security is a shared design responsibility. Laserfiche provides capabilities such as granular access controls, encryption, version history, and auditing. Organizations remain responsible for defining appropriate access, administering users and permissions, and aligning configuration with their requirements.

CONTROL AREA	PLANNING QUESTIONS
Access	Who needs to view, create, change, approve, export, or administer information?
Sensitive content	What information requires tighter restriction, redaction, or special handling?
Auditability	Which actions and decisions must be traceable?
Retention	What event starts retention, and who authorizes final disposition?
Continuity	How will the solution support availability, recovery, and ongoing administration?

Cloud and self-hosted deployment

Laserfiche is available as a cloud service and as a self-hosted system. With Laserfiche Cloud, Laserfiche manages the underlying cloud infrastructure and associated platform protections. With a self-hosted deployment, the customer is responsible for securing and maintaining its servers, operating systems, databases, network, backups, and related infrastructure.

> **Important:** Certifications and platform capabilities do not automatically make every implementation compliant. Each organization should evaluate its requirements, select the appropriate offering, and configure and administer the system accordingly.

Records management

Records management extends beyond retaining documents. A sound program defines record series, ownership, cutoff events, retention periods, legal holds, disposition authority, and documentation of final actions. Laserfiche can support those policies when they are deliberately designed and administered.

INTELLIGENT INFORMATION

Use AI to reduce repetitive information work

Laserfiche AI capabilities can help extract details, classify content, support natural-language questions, summarize documents, and assist with approved actions. These tools are most useful when paired with clear access controls, human review, and well-defined business processes.

CAPABILITY	PRACTICAL USE
Smart Fields	Identify and extract needed details from documents and apply structured metadata.
AI-Assisted Forms	Help populate form fields using information extracted from uploaded documents, reducing manual entry and improving the form submission experience.
Smart Chat	Ask questions about permitted content using natural language.
Document summarization	Create a concise starting summary for longer documents.
Audio/video transcription	Make recorded content searchable and easier to review.
AI Agents	Propose and complete approved multi-step content actions in Laserfiche Cloud.

Human review: AI-generated results should be reviewed when accuracy, policy, legal obligations, or unfamiliar terminology matter. Availability and allowances depend on the selected Laserfiche offering and subscription.

Build on a governed foundation

AI does not replace information architecture. Clear templates, metadata, access rules, retention decisions, and process ownership make intelligent capabilities more reliable and easier to govern.

Where AI can add value

- Extracting invoice, agreement, case, or employee-document details.
- Summarizing policies, meeting records, contracts, or supporting documentation.
- Finding key information without manually reading every page.
- Identifying and organizing information for a review process.
- Reducing repetitive repository maintenance through approved actions.

WHERE TO BEGIN

Start with a useful, achievable outcome

A successful Laserfiche initiative does not need to begin with an enterprise-wide transformation. Many organizations start with one meaningful information problem, establish a sound foundation, demonstrate value, and expand from there.

STEP	FOCUS	OUTPUT
1	**Choose the problem**	A process or information set with visible operational value.
2	**Define the information**	Documents, data, metadata, security, history, and retention needs.
3	**Map the work**	Roles, decisions, exceptions, approvals, notifications, and handoffs.
4	**Configure and test**	A working solution validated with representative users and content.
5	**Train and improve**	Documented ownership, support, measures, and next-stage opportunities.

How Nine Peaks Solutions can help

Nine Peaks Solutions helps organizations evaluate deployment options, plan permissions, define metadata, configure access controls, automate processes, connect systems, train users, and support Laserfiche Cloud and self-hosted environments. The objective is a solution that fits the organization's operational, security, and information-management requirements.

DISCUSS YOUR LASERFICHE REQUIREMENTS

Schedule a consultation | Explore Laserfiche resources

Additional Resources

Nine Peaks Solutions Resources

Laserfiche Basics — An introduction to Laserfiche and its capabilities.

Laserfiche Glossary & Project Terms — Definitions of terminology used throughout our resources.

Nine Peaks Solutions Resources — Practical guides, planning tools, and educational materials.

The Nine Peaks Collection — Explore the complete series of publications and practical guides.

Laserfiche 30 Day Free Trial — Explore Laserfiche Cloud capabilities with a free trial.

Laserfiche Product Resources

Laserfiche product overview

Laserfiche document and records management

Laserfiche intelligent data capture

Laserfiche artificial intelligence

Product information in this guide was prepared using current public Laserfiche materials and Nine Peaks Solutions implementation experience. Capabilities, packaging, availability, and subscription allowances may change and should be confirmed for the selected offering.

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