Technology Services

Laserfiche Shared Service

Laserfiche Best Practices

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1. Not collecting SSNs in public Forms. Instead collect partial SSN
2. Within Forms using security groups wherever possible. If you have lot of people that are submitters/business managers, they should be in a group
3. Cleaning up Test data in Dev or Staging repositories on a routine basis
4. Cleaning up Suspended/In Progress instances in Dev and Staging Forms on a routine basis
5. Always have the repository name as the first starting condition in Condition based Workflow rule
6. Always naming processes to start with the group name
7. Configure Process Notifications in Forms so that notification is sent whenever a process gets suspended or terminated
8. Set the File Storage Location to point to the appropriate one