

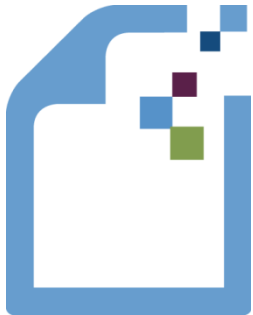


Laserfiche®
Enterprise Document Management

Texas A&M Laserfiche Community Connect User Discussion

Hosted by

Texas A&M Information Technology, Laserfiche and SMARTfiles

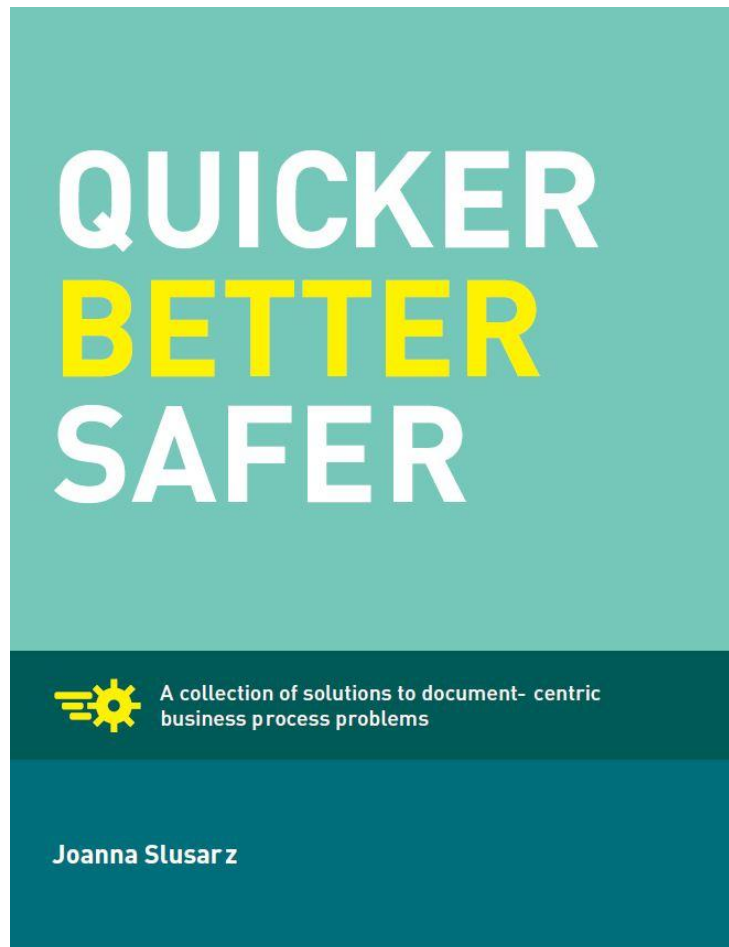


Presented by Judith H. Lewis, MS, PMP
Sr. IT Manager, Computing & Information Services
Project Manager, Texas A&M IT Laserfiche Shared Service

April 4, 2013

Shared Service Resources

Judith Lewis



Published by Compulink Management Center, Inc.,
2012.

Quicker Better Safer Contents

Judith Lewis

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Quicker Better Safer Featured Example

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CONTRACT MANAGEMENT

TEXAS A&M UNIVERSITY SYSTEM

Industry: **Higher Education**
Number of employees: **1,000- 5,000**
Headquarters: **College Station, TX**

Texas A&M University's Health Science Center (HSC) reaches across Texas to educate health professionals and researchers. The HSC originally implemented Laserfiche in 2008 in the finance department; today, the HSC's Laserfiche implementation spans eight different cities.

The Contracts Administration Office is responsible for processing, reviewing and approving contracts from various departments within the HSC.

Here is how it uses Laserfiche Workflow to decrease processing time from more than six weeks to a mere one or two weeks per contract.

88

Quicker Better Safer Detailed Examples

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Trevor Moran, Senior Information Technology Consultant at the Texas A&M University System Health Science Center (HSC), demonstrates how Laserfiche Workflow helped the HSC decrease contract processing time from eight to two weeks.

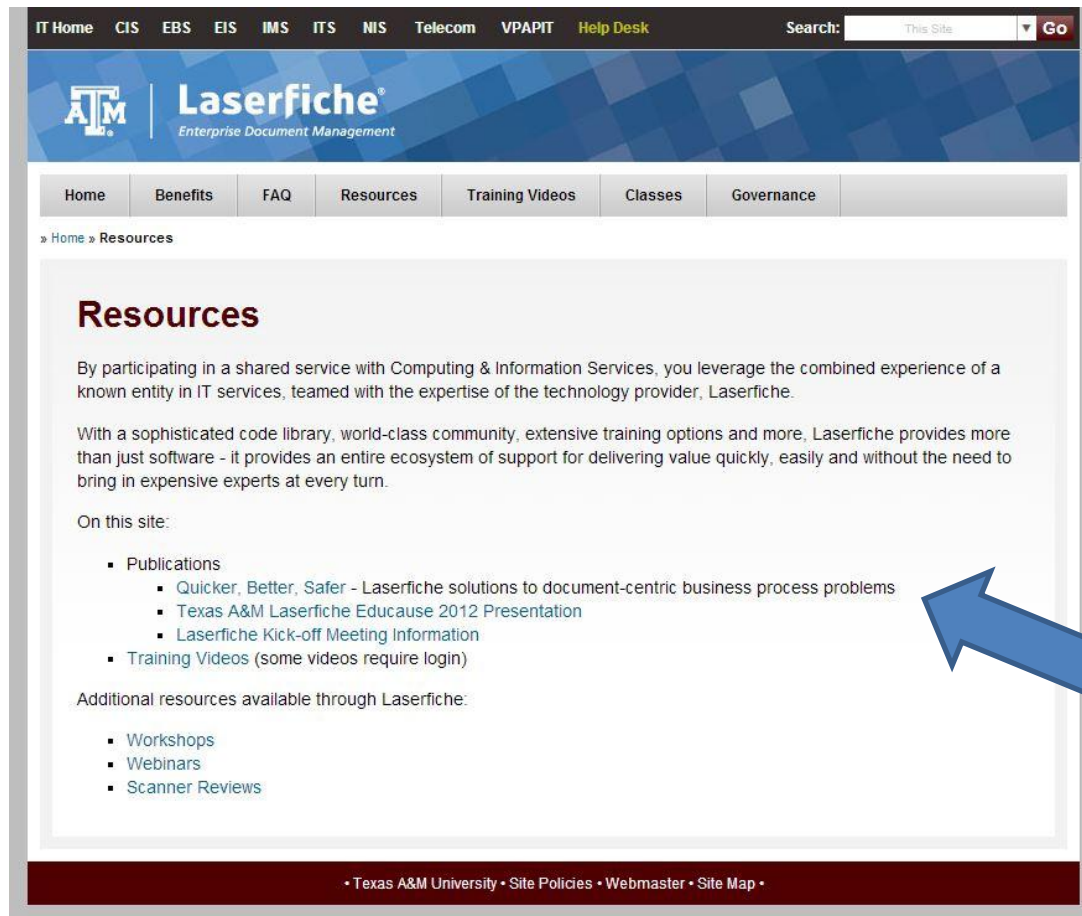
STORE INITIAL CONTRACTS IN LASERFICHE

Contracts originate in different HSC departments, including the College of Medicine, the College of Nursing, the College of Pharmacy, the College of Dentistry and the School of Rural Public Health. Staff from those departments can either scan documents directly into the "For HSC Review" folder in Laserfiche or use Laserfiche Snapshot to print the documents into the folder. During this scanning or printing process, the staff member manually enters the required metadata into the document's template. In the template screenshot below, all the fields denoted in red are required.

The screenshot displays the Laserfiche 'Template: Contract' form. It includes a 'Metadata' section at the top with tabs for 'Info', 'Page 1', 'Info', and 'Versions'. The form contains numerous fields, many of which are marked as required in red text. These include 'Contract Number', 'Contract Author', 'HEIN', 'Business Type', 'Expenditure', 'Other Party', 'TREVOR TEST CONTRACT', 'Other Party Contact Name', 'TREVOR TEST CONTRACT', 'Other Party Contact Phone', 'HSC Component', 'COM', 'Department Number', 'S-330', 'HSC Component Contact Name', 'Tanner Request', 'HSC Component Contact Phone', 'HSC Component Contact Email', 'TREVOR TEST CONTRACT', 'Type of Contract', 'Affiliation', 'Contract Description', 'Contract Begin Date', 'Contract End Date', and 'Contract Complete Date'. A summary section on the right lists 'Total Contract Value', 'Source of Funds', 'Business Associate Addendum', and 'Address of Requested Review'. It also includes a list of 'Contract Reviewed by' with names like 'Ruth Goffin', 'Mike Goffin', 'Jim Joyce', 'Ruth Goffin', 'Robin Bourke', 'Julie Bishop', and 'Scott Hester'. At the bottom, there are fields for 'Contract Received Date' (2/28/2012 12:00:00 AM), 'Assigned HSC Admin Signature' (VP for Academic Affairs), and 'Signed by VP of Academic Affairs'.

Quicker Safer Better: Where to get it?

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IT Home CIS EBS EIS IMS ITS NIS Telecom VPAPIT Help Desk Search: This Site Go

ATM | **Laserfiche®**
Enterprise Document Management

Home Benefits FAQ Resources Training Videos Classes Governance

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Resources

By participating in a shared service with Computing & Information Services, you leverage the combined experience of a known entity in IT services, teamed with the expertise of the technology provider, Laserfiche.

With a sophisticated code library, world-class community, extensive training options and more, Laserfiche provides more than just software - it provides an entire ecosystem of support for delivering value quickly, easily and without the need to bring in expensive experts at every turn.

On this site:

- Publications
 - [Quicker, Better, Safer - Laserfiche solutions to document-centric business process problems](#)
 - [Texas A&M Laserfiche Educause 2012 Presentation](#)
 - [Laserfiche Kick-off Meeting Information](#)
- [Training Videos](#) (some videos require login)

Additional resources available through Laserfiche:

- [Workshops](#)
- [Webinars](#)
- [Scanner Reviews](#)

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Laserfiche 9 is here

Uniting ECM and BPM so organizations make smarter decisions

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Thought leaders and technical experts share strategy, guidance and success stories on improving efficiency, cost savings and more.

Workshops
Free in-person workshops showcase solutions that can directly sharpen your competitive edge.

Regional Training
Get personalized, in-depth instructions from the experts who work with and support

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The screenshot shows the Laserfiche website homepage. The top navigation bar is orange and contains the following links: PRODUCTS, INDUSTRY SOLUTIONS, BUSINESS PROCESSES, SUPPORT & TRAINING, and COMPANY & COMMUNITY. The 'COMPANY & COMMUNITY' link is circled in blue, and a large blue arrow points to it from the main headline area. To the right of the navigation bar is a search bar with the text 'Search Laserfiche.com' and a magnifying glass icon. Below the navigation bar is a large blue banner with the text 'Laserfiche 9 is here' in yellow and white. Below this text is the tagline 'Uniting ECM and BPM so organizations make smarter decisions' and a row of icons representing various business processes. Below the banner is a row of five small square icons. To the right of these icons is a 'Contact Us: +1 800 985 8533' button with a phone icon. Below the banner is a section titled 'Powerful Document Management Software and Agile Enterprise Content Management Solutions'. This section contains two main columns. The left column has two sub-sections: 'Optimize your enterprise' and 'Transform your offices'. The right column is titled 'Laserfiche Events' and contains three sub-sections: 'Webinars', 'Workshops', and 'Regional Training'. Each sub-section has a brief description of the offering. A 'See All >' link is located at the top right of the 'Laserfiche Events' section.

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A proven solution used by 30,000 organizations, Laserfiche builds on your existing expertise—making your organization smarter, faster and more efficient.

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Laserfiche Events

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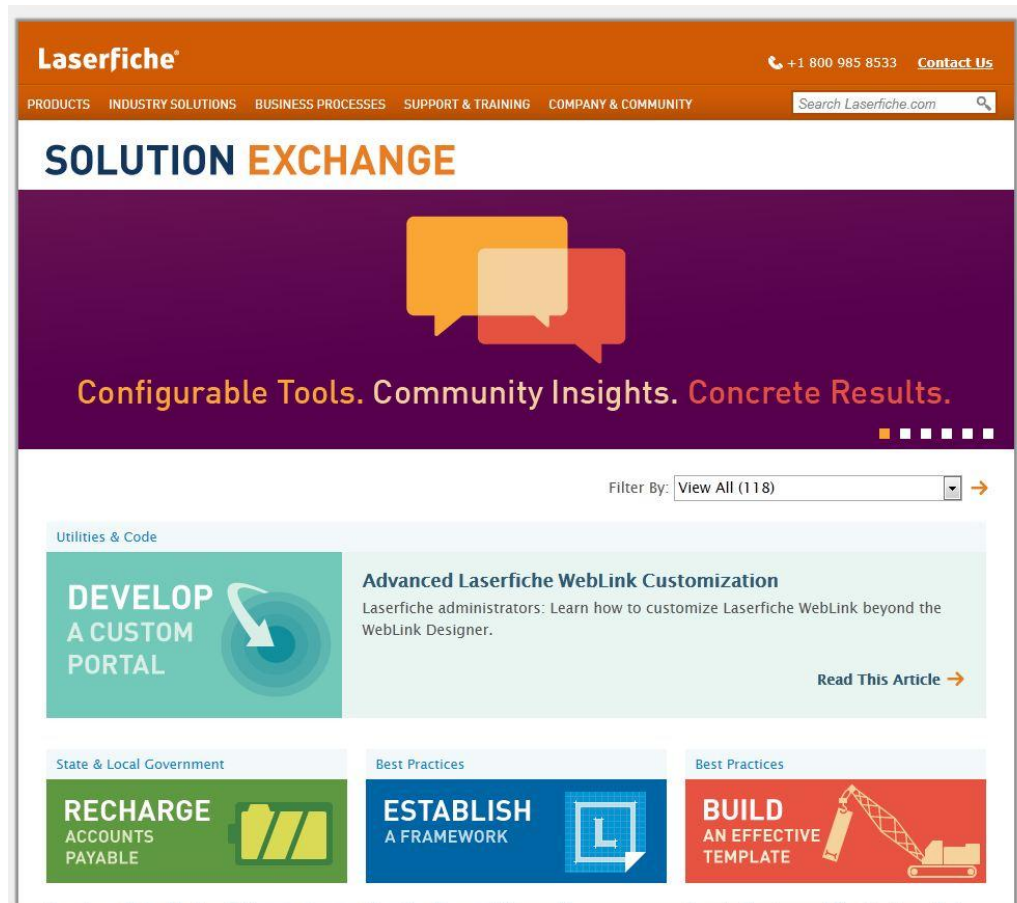
Webinars
Thought leaders and technical experts share strategy, guidance and success stories on improving efficiency, cost savings and more.

Workshops
Free in-person workshops showcase solutions that can directly sharpen your competitive edge.

Regional Training
Get personalized, in-depth instructions from the experts who work with and support

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DEVELOP A CUSTOM PORTAL

Advanced Laserfiche WebLink Customization

Laserfiche administrators: Learn how to customize Laserfiche WebLink beyond the WebLink Designer.

[Read This Article →](#)

State & Local Government

RECHARGE ACCOUNTS PAYABLE

Best Practices

ESTABLISH A FRAMEWORK

Best Practices

BUILD AN EFFECTIVE TEMPLATE

Laserfiche Annual Technical Conference

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Empower 2014, January 14 -17, 2014 in Anaheim, CA



- Use of Metadata
- Use of Workflow
- Use of Records Management Edition
- Use of API Toolkit
- Use of Mobile

Watch for Empower 2014 details:

<http://www.laserfiche.com/en-us/Conference>

User Discussion: Featured Laserfiche Users

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- Dr. Mark Wright,
Sr. Lead Microcomputer/LAN Manager
Texas A&M AgriLife Research
Department of Entomology
Texas A&M System for over 27 years



User Discussion: Featured Laserfiche Users

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- Sherry Escalante,
Manager of Faculty Services for the Look College of Engineering
Resource for over 760 engineering faculty
Liaison for the eleven engineering departments



Recognition

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- Laserfiche Engineers Elizabeth Cunningham and Andrew Kamar
- SMARTfiles Vicki Bienski and Tom Bienski
- Computing and Information Services (CIS) Executive Director, Dr. Pete Marchbanks
- Computing and Information Services Associate Director, Stephen T. Williams
- CIS Laserfiche Team:
 - Tim Knezek
 - Chris Thompson
 - Binu Koola
 - Michael Phillips



TAMU IT Laserfiche Shared Service

Judith Lewis

Thank you for your interest in Laserfiche.

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Computing and Information Services
Laserfiche Enterprise Shared Service

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Lunch

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Courtesy of Laserfiche and SMARTfiles