



# Payroll / HR Spooktacular

Thursday, October 30, 2014



Santa Clara County  
Office of Education

Santa Clara County  Office of Education

# Introduction to Document Management

October 30, 2014

# Presenter Information

**Lydia Cabrera**

**Applications System Analyst**

**Santa Clara County Office of Education**

**Lydia\_Cabrera@sccoe.org**

**(408) 453-4288**

# What does Document Management do for your organization?

- Resolve Paper and Storage Issues
- Gain centralized control over content
- Access content through various interfaces
- Automate business process



# What paper issues?

- Originals typically misplaced
- Slower distribution
- Paper is labor-intensive
- Inconvenience of retrieving files
- Staff spend 25% of their time searching for documents
- Storage

# Core Capabilities

- Search and Retrieve
- Capture
- Distribute
- Automate
- Secure



# Search and Retrieve



- Text
- Entry Name
- Fields (Template/Index)
- Annotations
- Folder Name
- User
- Date





# You Can Run...

- Client
- Web Access
- Mobile Access
  - IOS
  - Android





# Client Access

The screenshot shows the 'SCCOE-TEST - Laserfiche' application window. The interface includes a toolbar with icons for file operations, a location bar set to 'SCCOE-TEST', and a search bar. The main area is divided into a left sidebar showing a folder tree and a right pane displaying a table of documents.

**Location:** SCCOE-TEST

**Search:** Enter a search term

**File Edit View Tasks Tools Window Help**

**Folders**

- Laserfiche Repositories
  - SCCOE-TEST**
    - Accounting
    - General Services
    - Human Resources
    - Information Technology
    - Warehouse
    - Recycle Bin

Name	Pages	Indexed	Creation Date	Last Modified
Accounting		Yes	10/27/2014 10:38:52...	10/27/2014 10:38:52...
General Services		Yes	10/27/2014 10:39:54...	10/27/2014 10:39:54...
Human Resources		Yes	10/27/2014 10:39:26...	10/27/2014 10:39:26...
Information Technolo...		Yes	10/27/2014 10:39:43...	10/27/2014 10:39:43...
Warehouse		Yes	10/27/2014 10:40:00...	10/27/2014 10:40:00...

5 entries

SCCOE-TEST (ADMIN) NUM



# Web Access

**Laserfiche Web Access**  
Santa Clara County Office of Education

ADMIN@SCCOE-TEST | [Settings](#) | [Help](#) | [Support Site](#) | [Log Out](#)

File Export Edit Tasks

Folders Search

Current folder

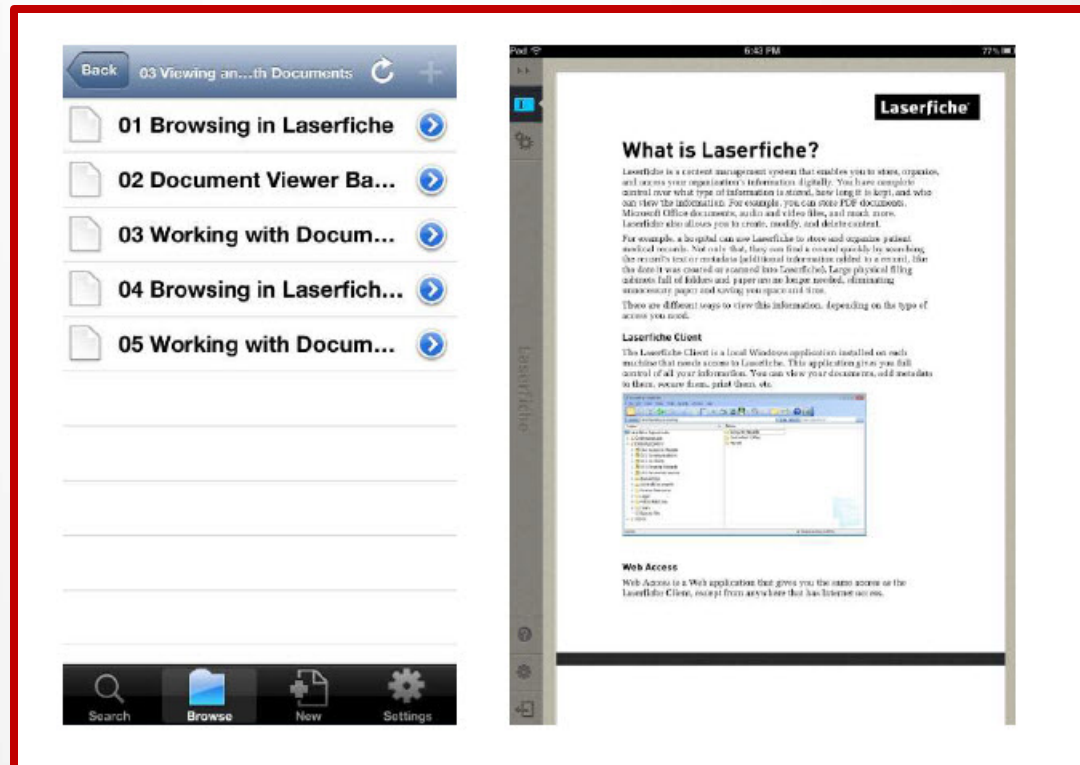
SCCOE-TEST

- Accounting
- General Services
- Human Resources
- Information Technology
- Warehouse
- Recycle Bin

Name	Pages	Indexed	Creation Date	Last Modified	Volume	Template Name
Accounting		Yes	10/27/2014 10:38:52 AM	10/27/2014 10:38:52 AM	SCCOE-TEST	
General Services		Yes	10/27/2014 10:39:54 AM	10/27/2014 10:39:54 AM	SCCOE-TEST	
Human Resources		Yes	10/27/2014 10:39:26 AM	10/27/2014 10:39:26 AM	SCCOE-TEST	
Information Technology		Yes	10/27/2014 10:39:43 AM	10/27/2014 10:39:43 AM	SCCOE-TEST	
Warehouse		Yes	10/27/2014 10:40:00 AM	10/27/2014 10:40:00 AM	SCCOE-TEST	

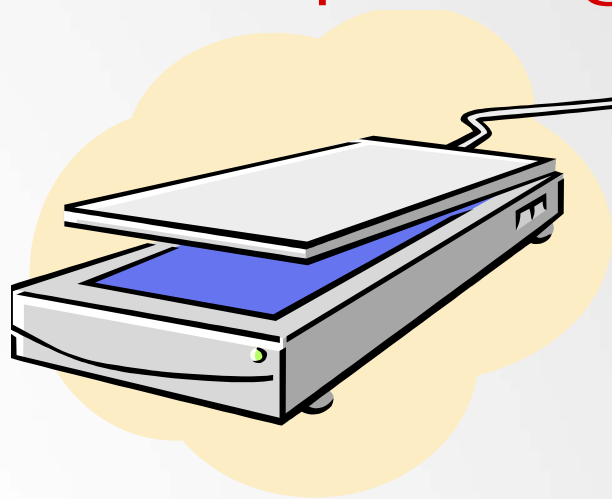


# Mobile: IOS or Android

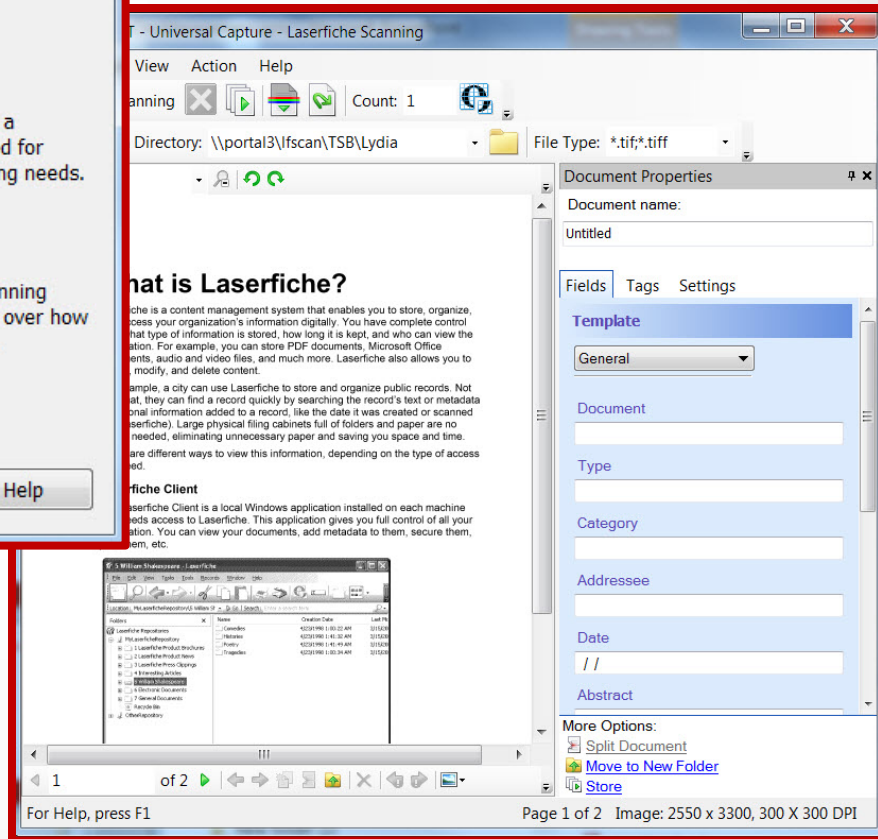
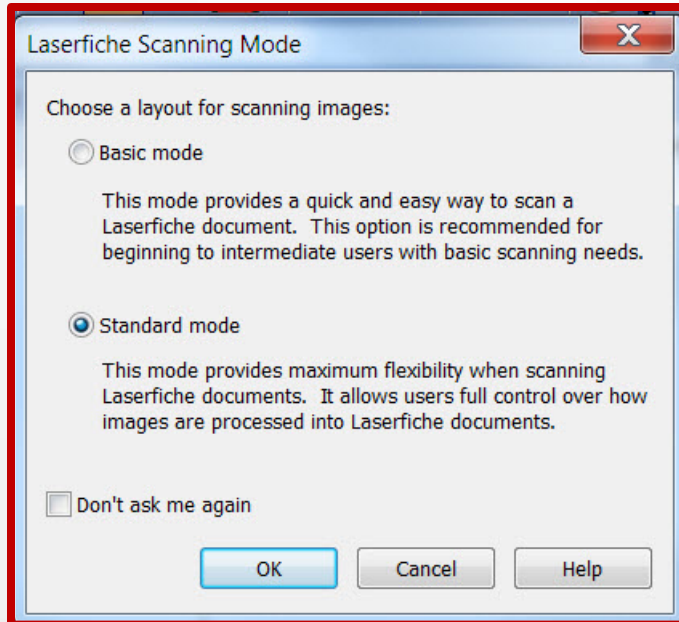


# Capture: Many faces of Importing

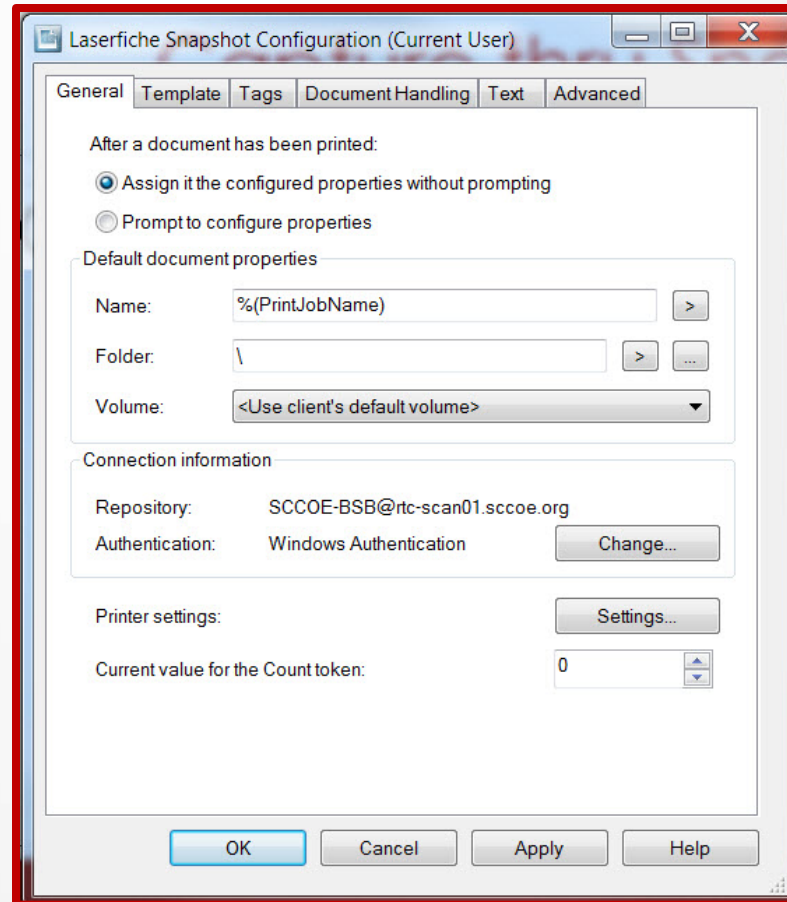
- Scanning
- Snapshot
- PhotoDocs
- Office Integration
- Laserfiche Mobile
- Quick Fields
- Import Agent
- Forms



# Capture thru Scanning



# Capture thru Snapshot



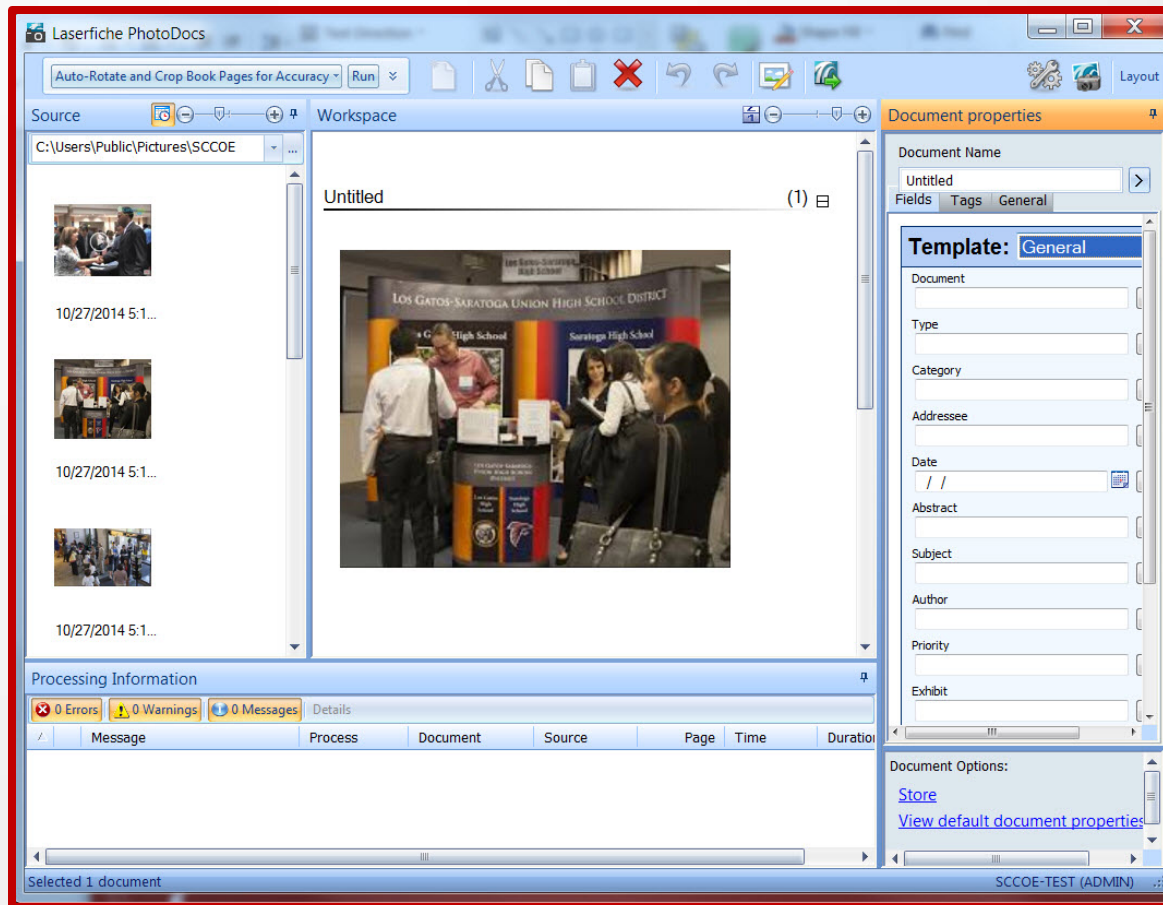
The screenshot shows the 'Laserfiche Snapshot Configuration (Current User)' dialog box. It has a tabbed interface with 'General' selected. The 'General' tab contains the following settings:

- After a document has been printed:**
  - ☒ Assign it the configured properties without prompting
  - ☐ Prompt to configure properties
- Default document properties:**
  - Name:**  >
  - Folder:**  > ...
  - Volume:**  ▾
- Connection information:**
  - Repository:** SCCOE-BSB@rtc-scan01.sccoe.org
  - Authentication:** Windows Authentication Change...
- Printer settings:** Settings...
- Current value for the Count token:**  ▴ ▾

At the bottom of the dialog are four buttons: OK, Cancel, Apply, and Help.

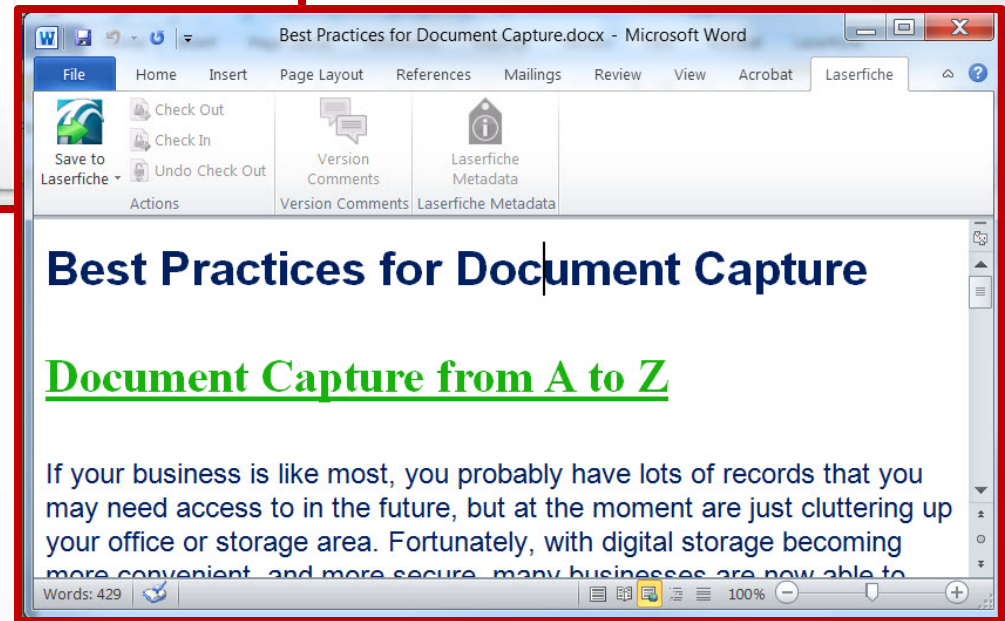
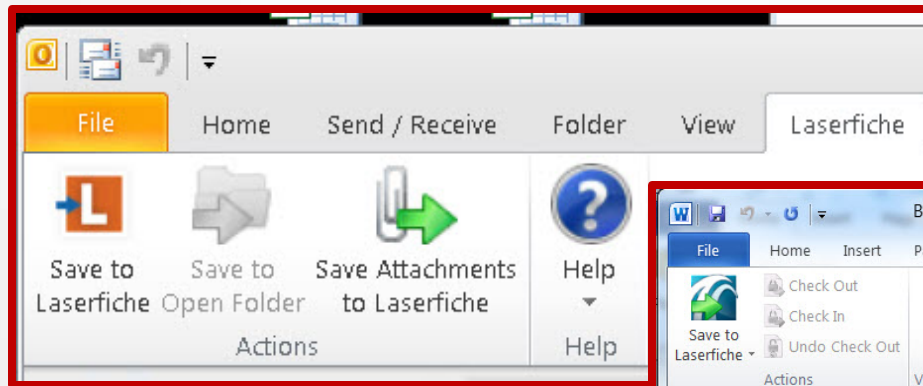


# Capture thru PhotoDocs

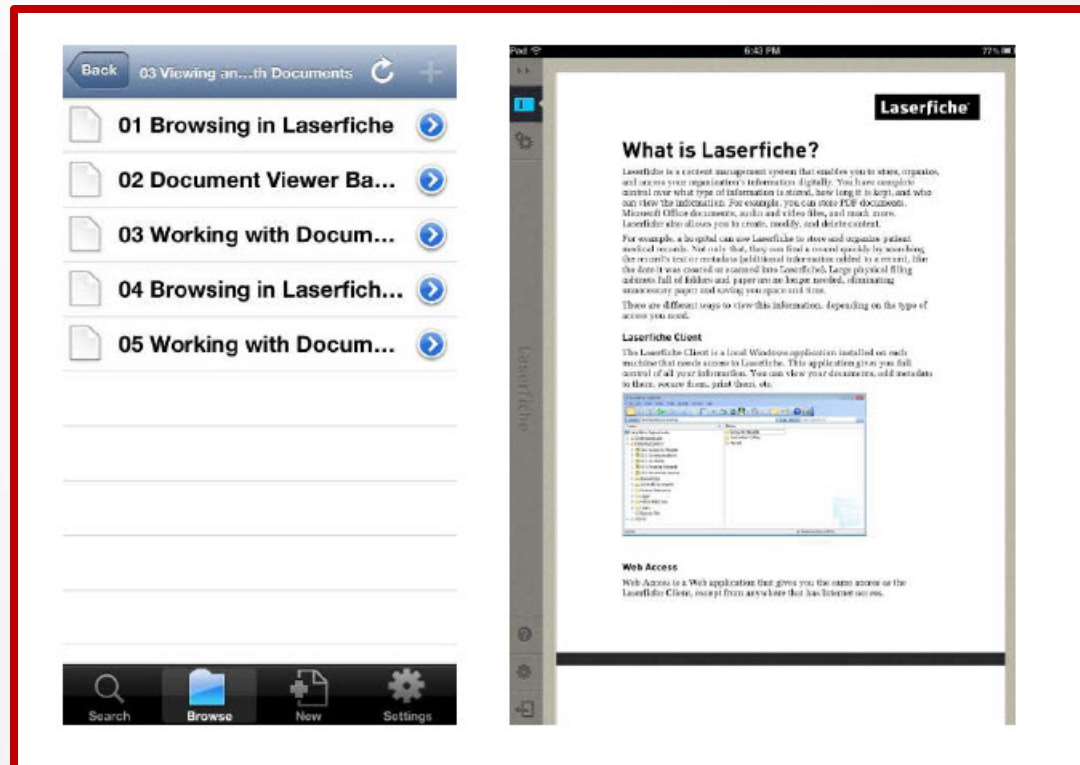




# Capture thru Office Integration



# Capture thru Mobile Access



# Capture thru Quick Fields

General Application - Universal Capture - Quick Fields

File Edit View Action Scan Tools Help

Search Directory: C:\Users\misty.kalousek\Desktop\Application File Type: \*.tif

Session Configuration

- General Application
- Pre-Classification Processing
- Classification
- Admission
- Financial Aid

Session Configuration Profiles

Document Revision

- Document Manager
- Unidentified Documents

13%

Samples

Admission

Default document name: %(First Name) %(Last Name) - Admi

Fields Tags Properties

Template: Application

Name

%(First Name) %(Last Name)

Student ID

Application Type

Admission

Address

%(Address)

Processing Information

0 Errors 0 Warnings 0 Messages Clear All

Message Process... Document... Page Document...

Processing Information Find Documents Thumbnails

For Help, press F1

Page 1 (2,933.4 KB): 2550 x 3300, 299 X 299 DPI

**Laserfiche**  
Run Smarter

**ADMISSION APPLICATION**

**A. CONTACT INFORMATION**

Family (Last, First, MI)	First Name	Initial Name	Phone Type or Prefix
Hunter	Jason	David	

**Current Mailing Address and Contact Information (Info) (PDF documents should be sent)**

Street Address	City and State/Province	Postal Code	Country
1827 Perspective Ave.	Los Angeles, CA	90006	United States

Telephone (please include country and area codes) Social Security Number Email

213-555-4055	265-45-7895	Jason@Hunter.com	
--------------	-------------	------------------	--

**Permanent Mailing Address and Contact Information (Info) (PDF documents should be sent)**

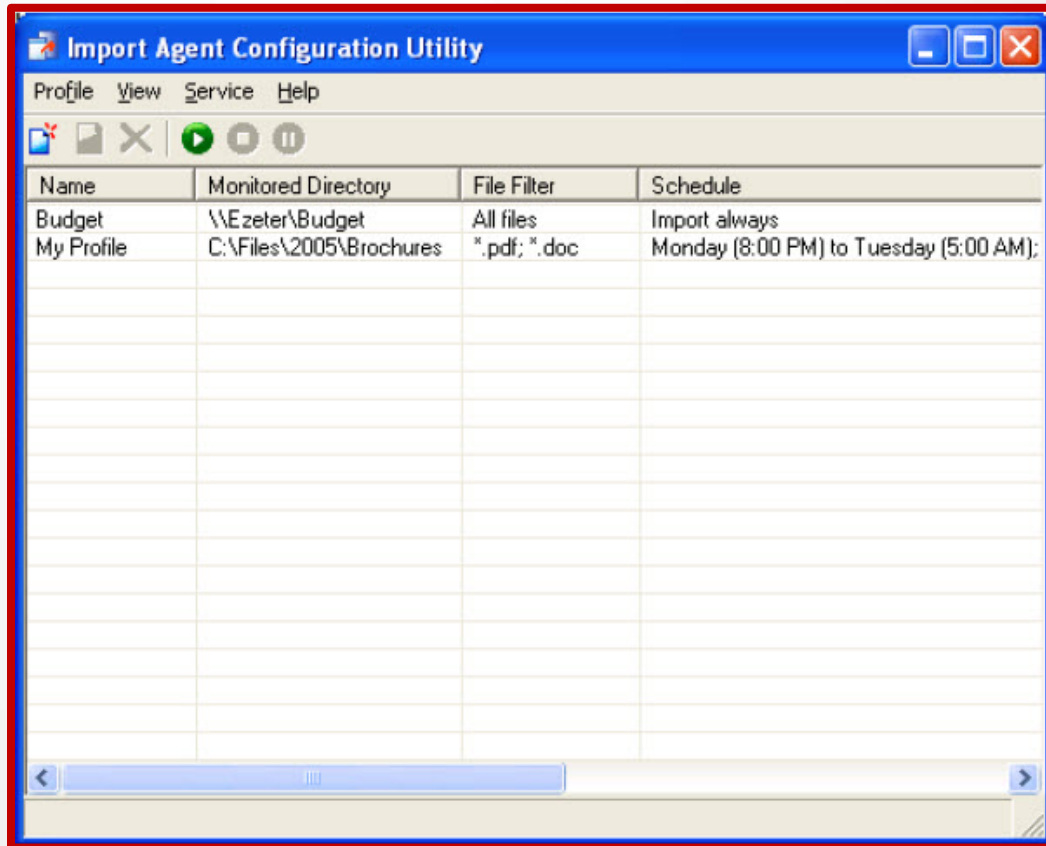
Street Address	City and State/Province	Postal Code	Country
1827 Perspective Ave.	Los Angeles, CA	90006	United States

Telephone (please include country and area codes) Fax Email

213-555-4055		Jason@Hunter.com	
--------------	--	------------------	--

**B. DEMOGRAPHIC DATA**

# Capture thru Import Agent



# Capture thru Forms

**Vacation Request Form**

Employee Name

Today's Date

**Vacation Information**

Start Date

End Date

Contact and Replacement Info


Additional Comments

Reason for Request


Submit



# Distribute by... sharing

Santa Clara County  Office of Education

Document Management


 Technology Services

Select the repository to log into from the available list

Repository:


User name:

Password:

Security 

☒ This is a public or shared computer

☐ This is a private computer



Login



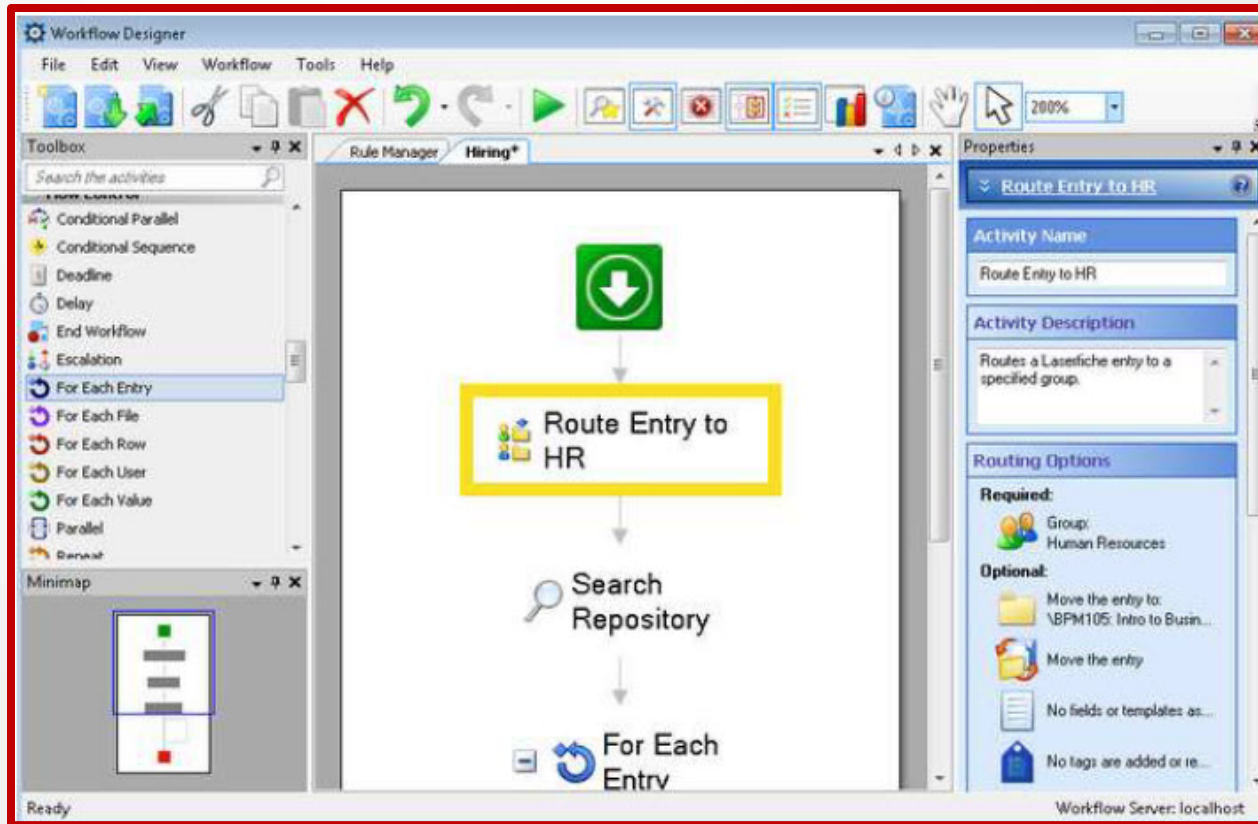
# Automation

- Workflow
- Quick Fields
- Forms

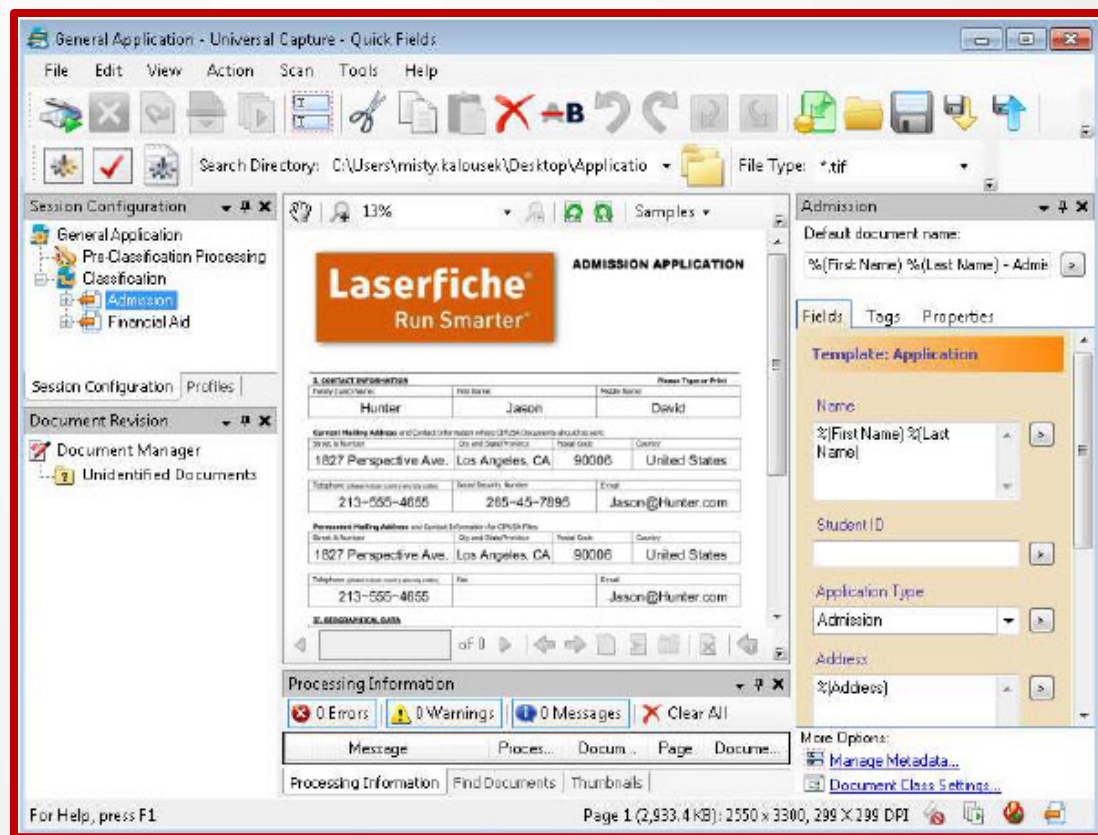





# Automate thru Workflow



# Automate thru Quick Fields



# Automate thru Forms

**DBAS Scanning Cover Sheet**

User

Type of Services \*

Select type of DBAS Service

☐ Advisory Services

☐ Business Services

☐ Charter School

List of SCCOE Districts \*

Choose from drop down menu

List of Charter Schools \*

Choose from drop down menu

Fiscal Year \*

Choose from drop down menu

Document Name \*

Attachments \*

Choose Files

Or drag files here

Submit



# Secure... lock it down

- Granular Security
- Windows/Password Authorization
- Audit Trail



# Granular Security

The screenshot shows a software interface for assigning rights. The window has a title bar with tabs: 'Gene...', 'Groups', 'Rights', 'Tags', 'Audit...', and 'Attrib...'. The 'Rights' tab is selected. Below the tabs, there are two sub-tabs: 'Assign Rights' and 'Effective Rights'. The 'Assign Rights' sub-tab is active. Below the sub-tabs, there are 'Save' and 'Cancel' buttons, and a help icon (?). The main content area is divided into two sections: 'Feature Rights' and 'Privileges'. Each section contains a table with columns 'Assi...', 'Name', and 'Description'. To the right of each table are 'Set All' and 'Clear All' buttons.

**Feature Rights:**

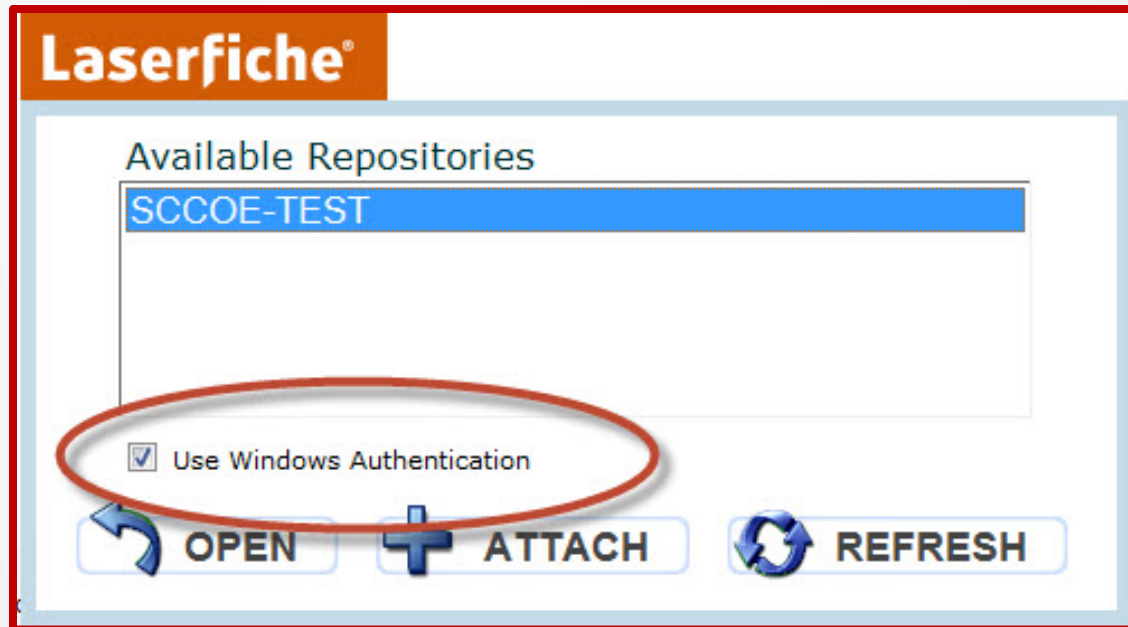
Assi...	Name	Description
<input type="checkbox"/>	Scan	Enables scan function
<input type="checkbox"/>	Import	Enables import function
<input type="checkbox"/>	Search	Enables search function
<input type="checkbox"/>	Print	Enables print function

**Privileges:**

As...	Name	Description
<input type="checkbox"/>	Manage Trustees	Administer users and groups
<input type="checkbox"/>	Manage Volumes	Administer volumes
<input type="checkbox"/>	Manage Entry Ac...	Assign entry access rights/Se...
<input type="checkbox"/>	Manage Templat...	Create and modify all templat...



# Windows Authentication



# Audit Trail

- Constantly monitor and record events such as:
  - Login and logout
  - Creation of files
  - Modification of files
  - Printing
  - Viewing
  - Exporting





# Audit Trail ...more

- Provides detail reports to identify trends and isolate behavior pattern

# Questions?



Santa Clara County  Office of Education

**Thank you!**