



# 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

SCCOE-TEST - Laserfiche

Location: SCCOE-TEST

File Edit View Tasks Tools Window Help

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

The screenshot displays the Laserfiche Web Access interface for Santa Clara County Office of Education. The user is logged in as ADMIN@SCCOE-TEST. The interface shows a file list for the current folder, SCCOE-TEST, with columns for Name, Pages, Indexed, Creation Date, Last Modified, Volume, and Template Name. The file list includes folders for Accounting, General Services, Human Resources, Information Technology, and Warehouse, all created on 10/27/2014.

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

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

File Export Edit Tasks

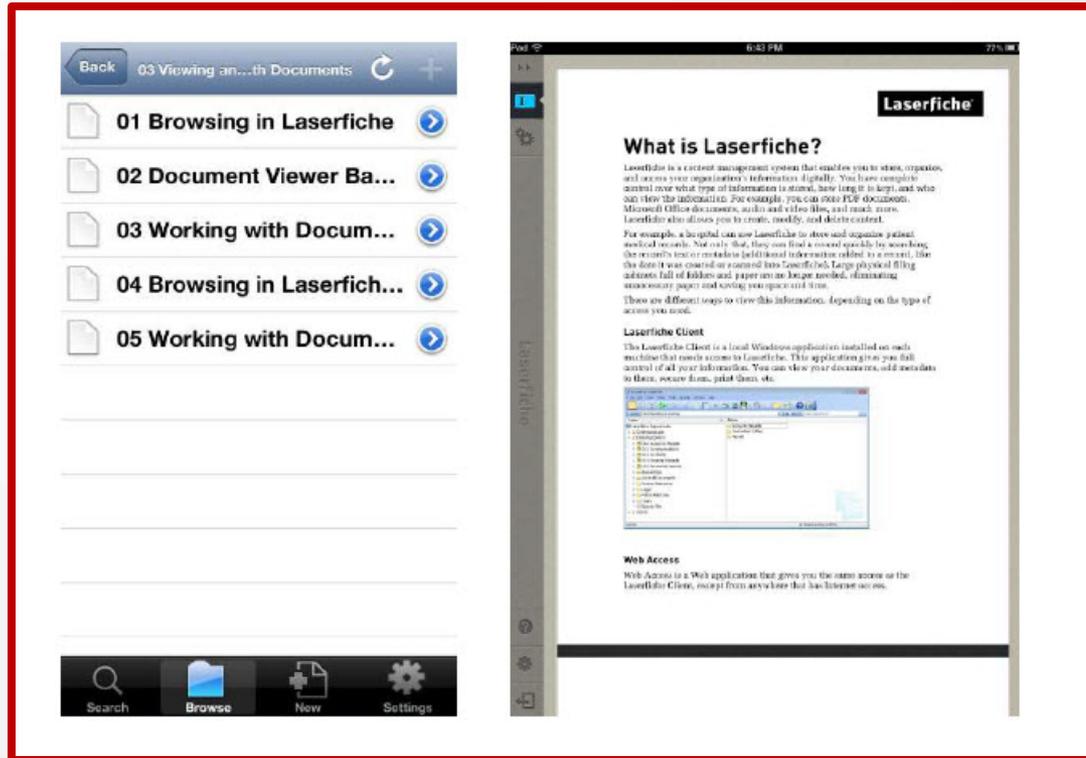
Current folder

Search...

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	

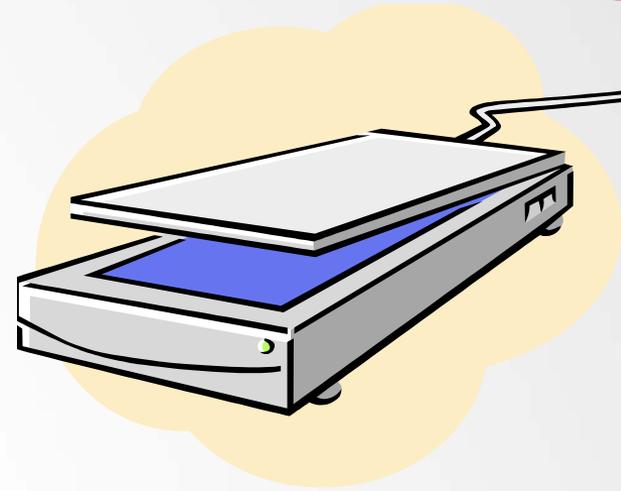


# Mobile: IOS or Android



# Capture: Many faces of Importing

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



# Capture thru Scanning

**Laserfiche Scanning Mode**

Choose a layout for scanning images:

Basic mode

This mode provides a quick and easy way to scan a Laserfiche document. This option is recommended for beginning to intermediate users with basic scanning needs.

Standard mode

This mode provides maximum flexibility when scanning Laserfiche documents. It allows users full control over how images are processed into Laserfiche documents.

Don't ask me again

OK Cancel Help

Universal Capture - Laserfiche Scanning

View Action Help

Count: 1

Directory: \\portal3\lfs\scan\TSB\Lydia File Type: \*.tif;\*.tiff

Document Properties

Document name: Untitled

Fields Tags Settings

Template

General

Document

Type

Category

Addressee

Date

Abstract

More Options:

Split Document

Move to New Folder

Store

For Help, press F1

Page 1 of 2 Image: 2550 x 3300, 300 X 300 DPI

**What is Laserfiche?**

Laserfiche is a content management system that enables you to store, organize, and access your organization's information digitally. You have complete control over what type of information is stored, how long it is kept, and who can view the information. For example, you can store PDF documents, Microsoft Office documents, audio and video files, and much more. Laserfiche also allows you to modify, and delete content.

For example, a city can use Laserfiche to store and organize public records. Not only can they find a record quickly by searching the record's text or metadata (small information added to a record, like the date it was created or scanned), they can also view the record in a variety of ways (e.g., as a PDF document or as a Laserfiche document). Large physical filing cabinets full of folders and paper are no longer needed, eliminating unnecessary paper and saving you space and time.

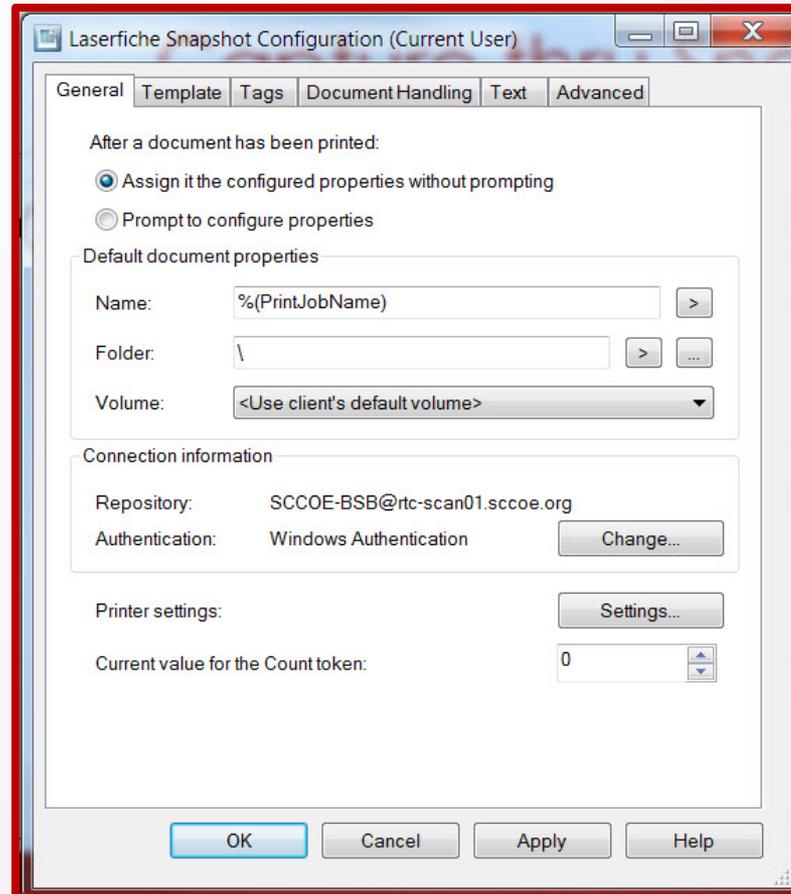
There are different ways to view this information, depending on the type of access you need.

**Laserfiche Client**

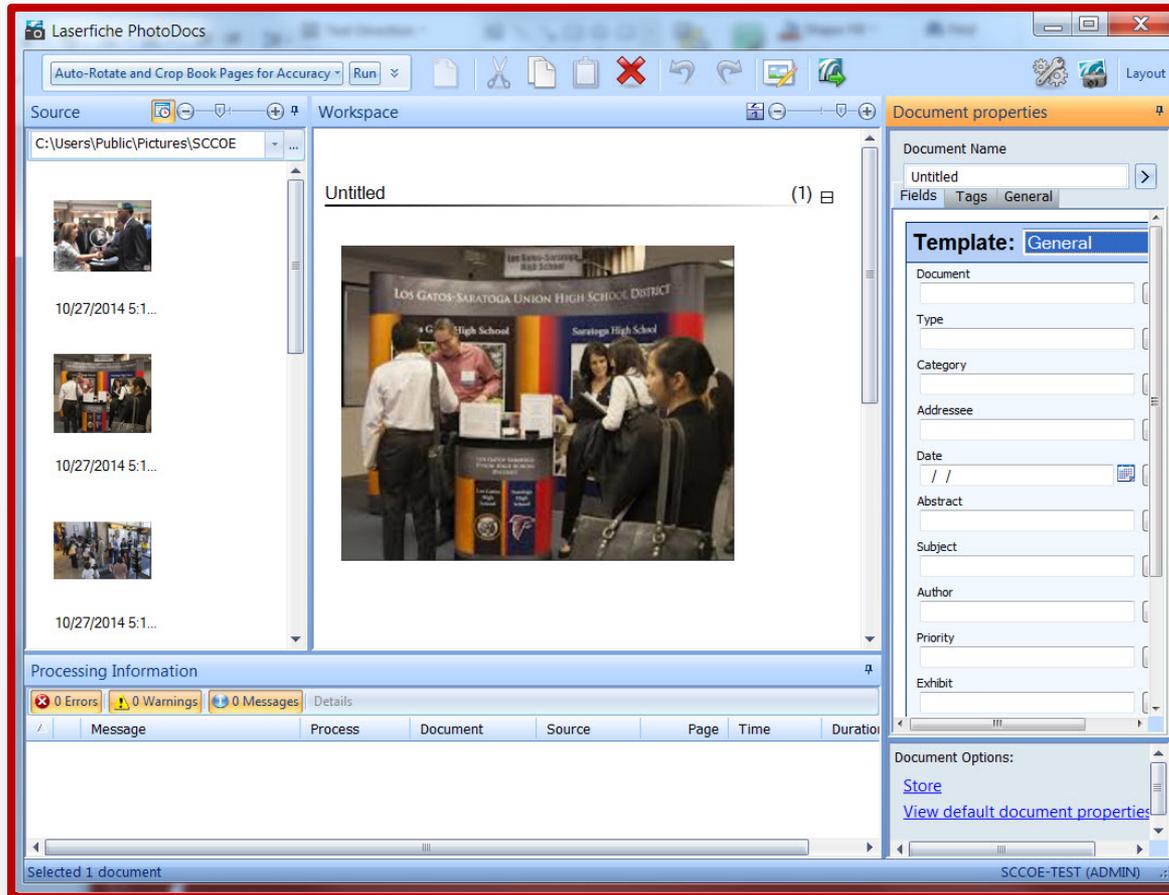
Laserfiche Client is a local Windows application installed on each machine that needs access to Laserfiche. This application gives you full control of all your information. You can view your documents, add metadata to them, secure them, and much more.

Name	Created	Modified	Last File
1. Laserfiche Reports	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
2. Laserfiche Reports	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
3. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
4. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
5. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
6. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
7. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
8. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
9. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
10. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
11. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
12. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
13. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
14. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
15. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
16. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
17. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
18. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
19. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	
20. Laserfiche Product Brochure	6/23/2010 1:02:22 AM	6/23/2010 1:02:22 AM	

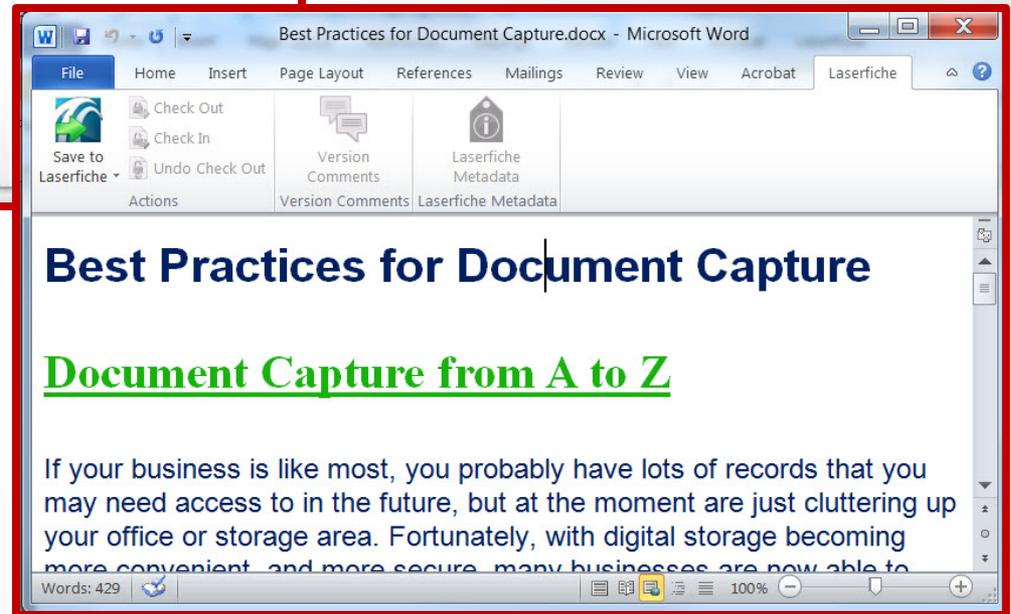
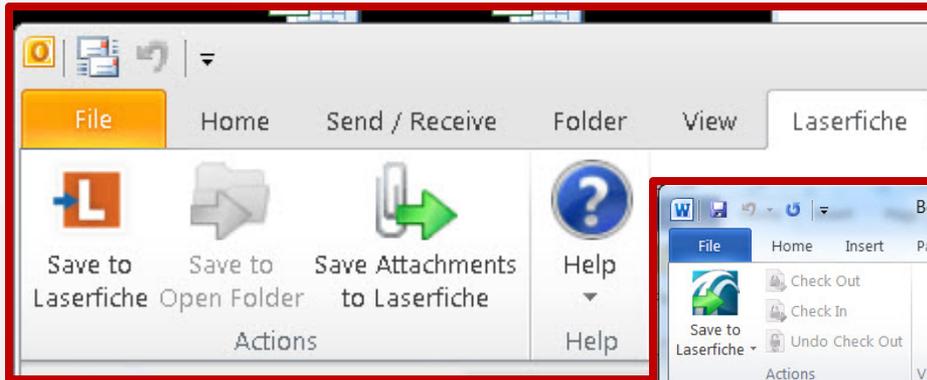
# Capture thru Snapshot



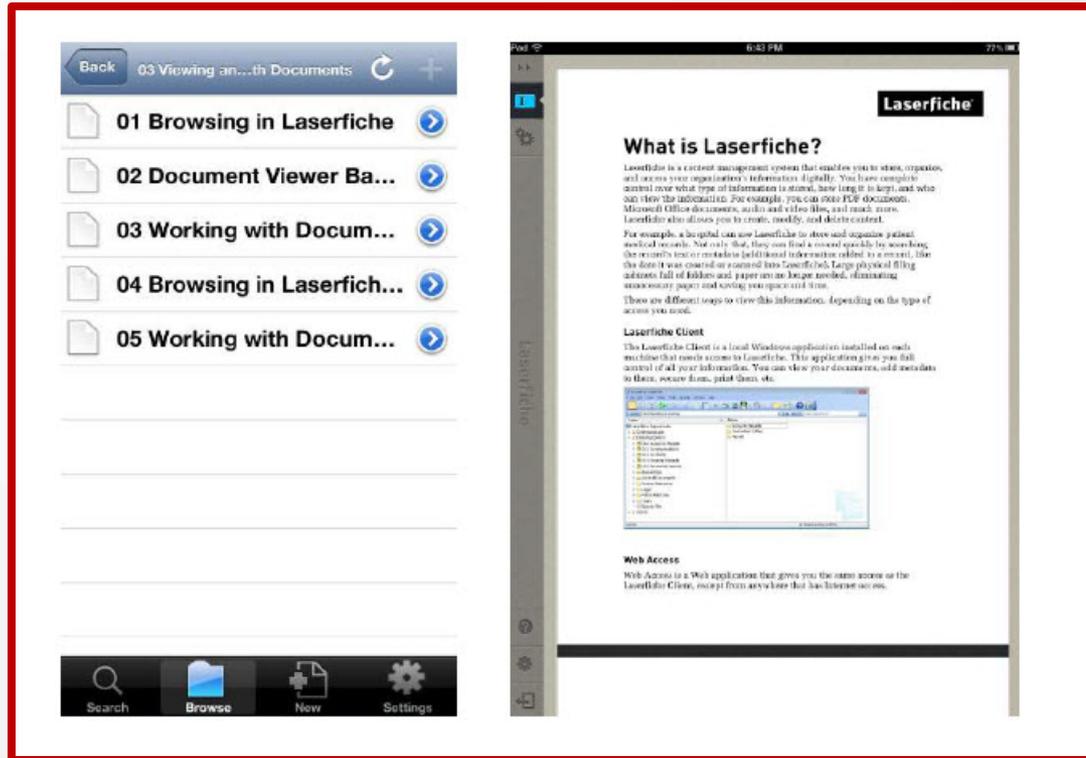
# Capture thru PhotoDocs



# Capture thru Office Integration



# Capture thru Mobile Access



# Capture thru Quick Fields

The screenshot displays the 'General Application - Universal Capture - Quick Fields' software interface. The main window shows a document titled 'ADMISSION APPLICATION' from 'Laserfiche Run Smarter'. The document content includes contact information for Hunter Jason and David, and address information for 1827 Perspective Ave, Los Angeles, CA 90006, United States. The interface features a menu bar (File, Edit, View, Action, Scan, Tools, Help), a toolbar with various icons, and a search directory set to 'C:\Users\misty.kalousek\Desktop\Application'. The 'Admission' field is selected, and the 'Quick Fields' panel on the right shows the 'Template: Application' with fields for Name, Student ID, Application Type, and Address. The 'Processing Information' panel at the bottom indicates 0 Errors, 0 Warnings, and 0 Messages. The status bar at the bottom shows 'Page 1 (2,933.4 KB): 2550 x 3300, 299 X 199 DPI'.

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

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 Proces... Docum... Page Docume...

Processing Information Find Documents Thumbnails

For Help, press F1 Page 1 (2,933.4 KB): 2550 x 3300, 299 X 199 DPI





# 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



# 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



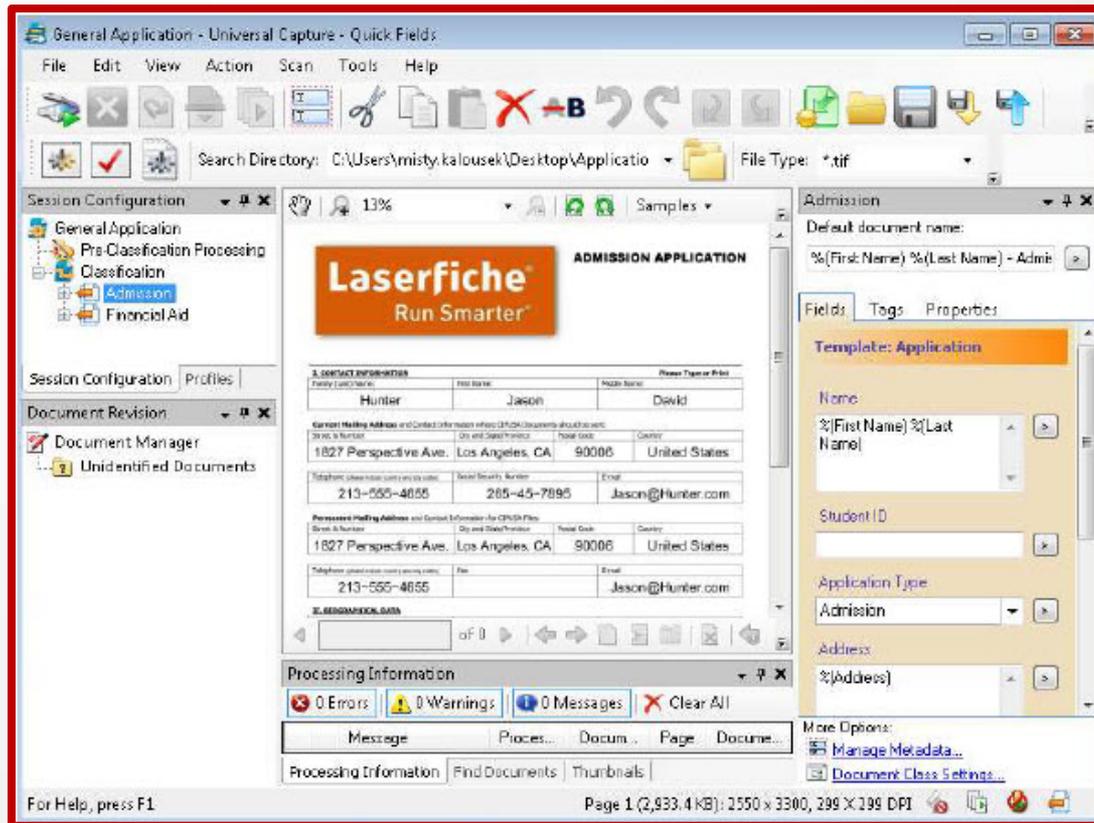
# Automate thru Workflow

The screenshot displays the Workflow Designer application window. The title bar reads "Workflow Designer". The menu bar includes "File", "Edit", "View", "Workflow", "Tools", and "Help". The toolbar contains various icons for workflow manipulation. The "Toolbox" on the left lists activities such as "Conditional Parallel", "Conditional Sequence", "Deadline", "Delay", "End Workflow", "Escalation", "For Each Entry", "For Each File", "For Each Row", "For Each User", "For Each Value", "Parallel", and "Repeat". The "Minimap" shows a small overview of the workflow. The main canvas, titled "Rule Manager Hiring\*", shows a workflow diagram with three activities: "Route Entry to HR" (highlighted with a yellow border), "Search Repository", and "For Each Entry". The "Properties" panel on the right shows the configuration for the selected "Route Entry to HR" activity, including its name, description, and routing options.

Workflow Server: localhost



# 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 \***   
Or drag files here



# Secure... lock it down

- Granular Security
- Windows/Password Authorization
- Audit Trail



# Granular Security

Gene... Groups Rights Tags Audi... Attrib...

Assign Rights Effective Rights

Save Cancel ?

**Feature Rights:**

Asi...	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

Set All  
Clear All

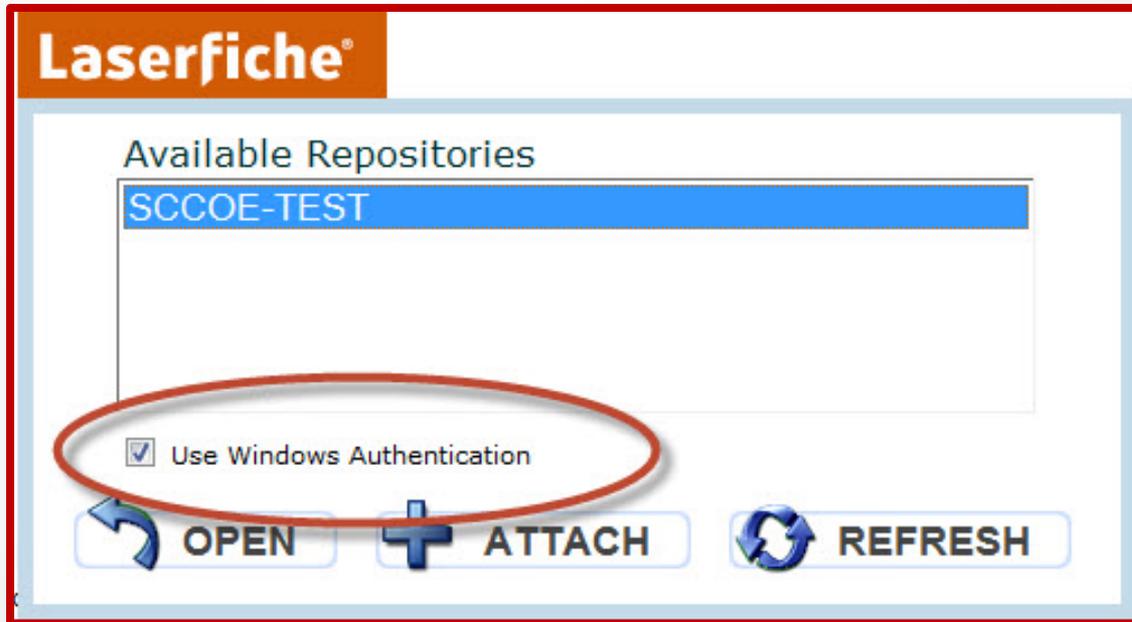
**Privileges:**

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...

Set All  
Clear All



# 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!**