

# QUICKER BETTER SAFER



## Laserfiche Forms

Joanna Slusarz



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**QUICKER BETTER SAFER**  
**Laserfiche Forms**

**Laserfiche**

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# INTRODUCTION

At Laserfiche, our goal is to help your organization take advantage of the deep knowledge you have about the ways your processes should run more efficiently—and we believe that the best way to do that is to empower all our users with the knowledge and expertise they need to deliver value quickly, easily and without the need to engage expensive experts.

This is especially true when it comes to automating the capture, routing and approval of information trapped on paper and PDF forms. According to Gartner, 85% of business processes are initiated by a form. Yet research shows up to 40% of submitted forms contain missing information that must be corrected manually.

Laserfiche Forms enables you to quickly and affordably extend your business processes to the point of capture by implementing the process rules and management oversight necessary to ensure accurate data collection and processing. And because we believe you're the expert on how your organization should run, it's designed to enable departments and business units to design and include web forms in their business processes, providing flexibility in form design and creation—while still allowing IT and Operations to maintain security and management controls.

This collection of real-world solutions provides an overview of ways customers around the world are gaining value from Laserfiche Forms, from streamlining hiring and claim processing to employee review and more. We invite you to tap into their knowledge to help employees within your organization become more informed and more efficient than ever before.





This book contains a collection of solutions that focus on Laserfiche Forms.  
For more than 150 additional solutions, please visit:

**[Laserfiche.com/SolutionExchange](http://Laserfiche.com/SolutionExchange)**



# HR PROCESSES

The human resources department generates a large number of forms—everything from the initial job application to performance evaluations of existing employees. Laserfiche Forms can streamline HR operations by automating forms processing, review and approval.

This section contains examples of how various organizations have used Laserfiche Forms to automate everything from employee onboarding to processing travel requests.

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# CONTRACTOR ONBOARDING: DCD GROUP

**Industry:** Commercial

**Number of Employees:** 501 – 1,000

**Headquarters:** Duncanville, Vereeniging, South Africa

**Integration:** Scubed Human Capital Management

Based in South Africa, DCD Group comprises four main divisions: rail, mining and energy, marine, and defense. The majority of the DCD Group's workforce comprises of temporary contractors, which is largely determined by the size of the contracts. Here is how DCD Group's marine division is using Laserfiche Forms and Laserfiche Workflow to reduce the time it takes to onboard a temporary contractor by fifty percent.



*Dawie Marais, General Manager Support Services, describes DCD Group's automated employee onboarding process.*

## **THE LEGACY HR PROCESS**

The number of employees at DCD Group can jump from 300 to 2,500 over a short period, putting huge pressure on the human resources (HR) department. In most cases, these contracts last 90 days and the manning up to the required capacity happens over 5 – 10 days. A contract employee may be hired up to four times during the financial year. During the contract period, the requirements change daily depending on the specific skills required at the stage of the project.

Here is what the process in the ship repair environment was like before the Laserfiche implementation.

- ▶ A foreman identifies a requirement for a new employee on a project and gets approval from the project manager.
- ▶ The foreman drives to the labor office and drops off his labor requisition with the HR department.
- ▶ The HR department calls the prospective employee and asks him to drive to the office.
- ▶ When the individual arrives, he fills out three different sets of documents, each one basically asking for the same information.
- ▶ These documents are emailed to the different departments, which all recapture this information into their various systems (including Scubed human capital management system).
- ▶ Two copies of the employment contract are printed. The individual must sign everything before being cleared to proceed to the medical and safety departments.

## THE CURRENT HR PROCESS

Laserfiche Forms working in conjunction with Laserfiche Workflow has simplified this process significantly.

- ▶ Labor requisitions are no longer physically dropped off at the HR department.
- ▶ After arriving at the HR office, the applicant sits down at a computer terminal and enters all of his personal information into the following form.

**LDC Contract Marine**

Employee Number	<input type="text"/>
Offshore	<input style="border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text"/>
Year	<input style="border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text"/>
Foreman/Supervisor	<input type="text"/>
Department ( Marine)	<input style="border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text"/>
Number Required (Marine)	<input type="text"/>
Project Number	<input type="text"/>
Project Name	<input type="text"/>
Request Date	<input style="border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text"/>
Activity Number ( Marine)	<input type="text"/>
Trade ( Marine)	<input style="border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text"/>
Special Requirements (Marine)	<input type="text"/>
LDC/Permanent (Marine)	<input style="border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text"/>
Citizenship	<input type="text"/>
Employee Surname	<input type="text"/>
Employee Name	<input type="text"/>
Employee ID ( Marine)	<input type="text"/>
Passport Number	<input type="text"/>
Home Language	<input style="border-bottom: 1px solid black; border-right: 1px solid black; border-left: 1px solid black; border-top: 1px solid black; width: 100%;" type="text"/>
Contact Number	<input type="text"/>



- ▶ As soon as the form is submitted, a copy is converted into Tiff and stored in the Laserfiche repository.

### ← LDC Contact Marine

Process Modeler > Forms > Access Rights > Publish > Results

**Status** Status shows whether a business process is published or hidden. Published processes are available for other users to see and interact with. Hidden processes can only be accessed by Admin users.

[Publish](#)

**Save to Laserfiche**  Save a copy of each submitted form to the repository

- Save as PDF
- Save as TIFF
- Save business process data as XML

Documents will be saved in folder: LaserRepository\LFForms\LDC Contact Marine

**Share** Use the URL, shown below to share this process with others.

<http://localhost/Forms/14> [Edit](#) [E-mail](#)

Use the code below to embed the form into an existing Web page.

```
<script type="text/javascript" src="http://localhost/Forms/js/form-embed.js"></script><script type="text/javascript">ifembed = new LaserficheForms.Form(null /*element to place form in*/, {bpid: '14', host: 'http://localhost/Forms'}) .getForm();</script>
```

- ▶ Laserfiche Workflow monitors the folder where the forms are stored. As soon as there is a new submission, Laserfiche Workflow opens the form and converts the data entered into the form fields into tokens with the “Retrieve Laserfiche Form Content” activity.

**Retrieve Laserfiche Forms Content**

**Activity Name**  
Retrieve Laserfiche Forms Content

**Activity Description**  
Retrieves the values from a Laserfiche Forms business process instance and stores those values as tokens.

**Server**  
Marine-Dms  
Host: http://localhost/Forms  
Authentication: Default Authentication

**Fields**  
LDC Contact Marine  
Effective Date ( Payroll Increase Date) [Date]  
Effective\_Date\_\_Payroll\_Increase\_Date [Date]  
Email Address [E-mail]  
Employee Address [Text]  
Employee Cell Number [Text]  
Employee ID ( Marine) [Text]  
Employee Name [Text]  
Employee Number [Text]  
Employee Postal Address [Text]  
Employee Surname [Text]  
Created Content Termination Date [Date]

**Process Instance**  
Retrieve the content from:  
 The instance that started this workflow  
 The instance with ID:  
%(RFVD\_Instance Id)  
Retrieve the content at the time of:  
 The most recent submission (when the workflow started)  
 The submission with ID:  
%(RFVF\_Submission Id)





- ▶ This data is then used within the “Insert Data” activity to populate the “Employee Details” table in the external SQL Marine database.

Properties

▼ Insert Data

**Activity Name**

Insert Data

**Activity Description**

Inserts the specified record into the selected data source.

**Data Source**

Employee Details

Database Type: Sql (ODBC)  
Database: employee\_data@marine-dms  
Authentication: Windows Authentication

**Data to Insert**

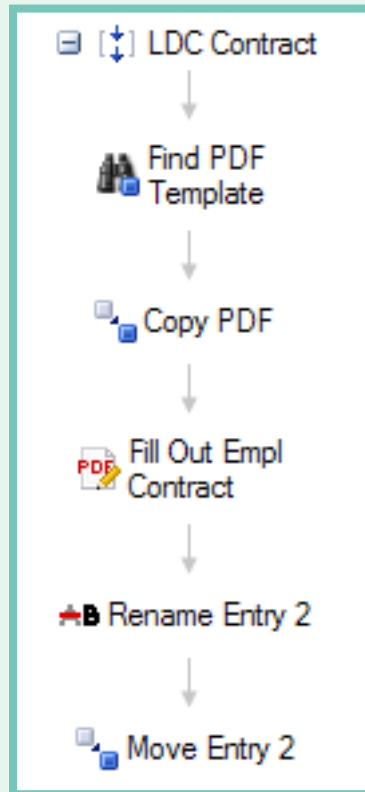
Select the table and then configure the values to insert in it.

Details

Column	Value
Offshore	%{RetrieveLaserfi...}
Request_Date	%{RetrieveLaserfi...}
Foreman_Supervisor	%{RetrieveLaserfi...}
Department	%{RetrieveLaserfi...}
Contact_Number	%{RetrieveLaserfi...}
Project_Number	%{RetrieveLaserfi...}
Activity_Number	%{RetrieveLaserfi...}

Set Values...

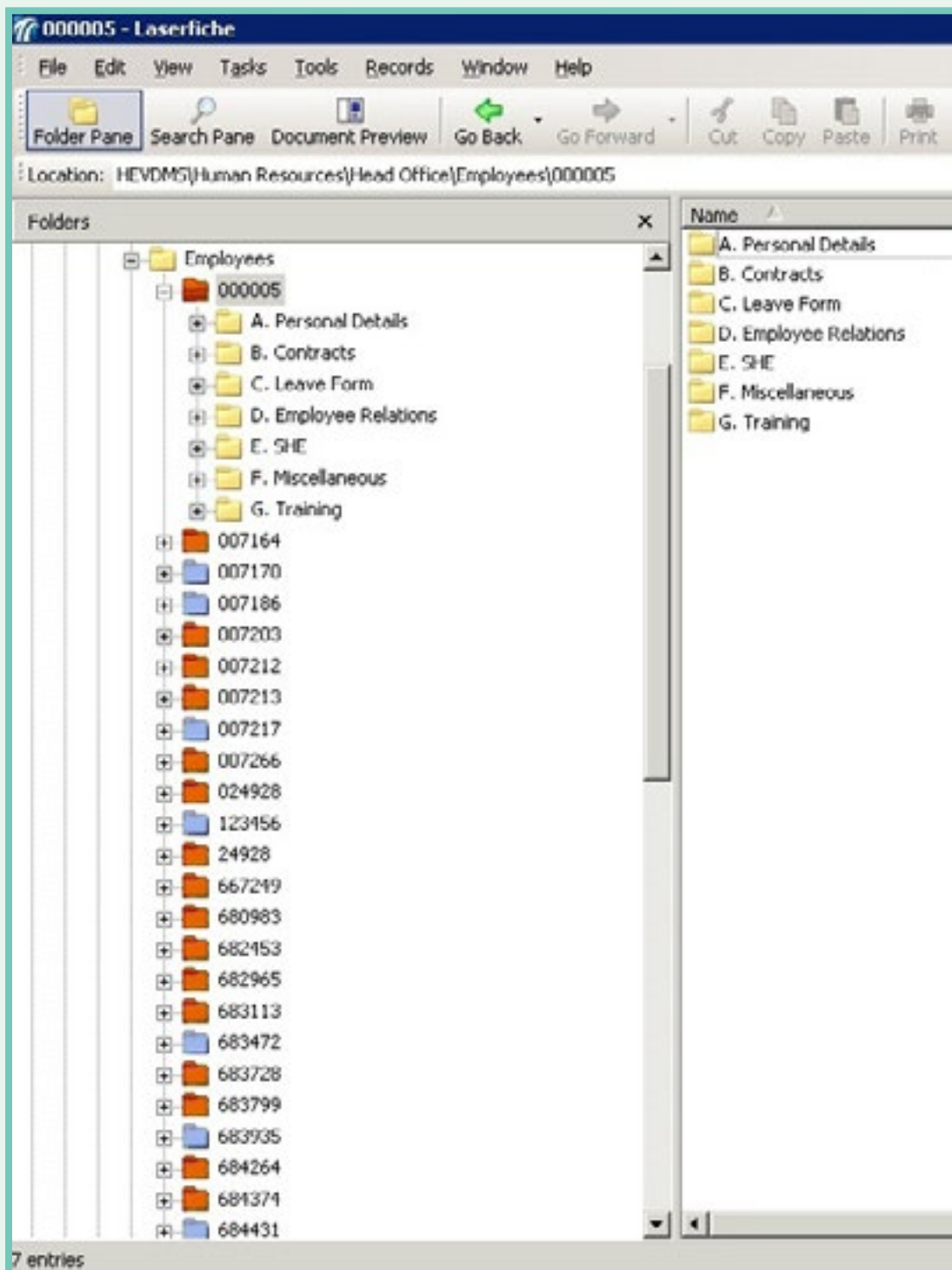
- ▶ A new template is added to the existing form and populated with the information from the employee database.
- ▶ Laserfiche Workflow then creates a new copy of a PDF contract, payroll and HR input forms and populates them with information obtained from the original Laserfiche form. Here is what the contract creation branch of the workflow looks like:



- ▶ All of this is done instantly behind the scenes, so that when the job applicant leaves the workstation, the pre-populated contract is printed and ready to be signed.
- ▶ The job applicant signs the contract with the Nashua Green Print GPS pen. The individual keeps the printed copy of the contract, and when the HR representative docks the pen, the signature is automatically copied onto the electronic version of the contract in the appropriate location.

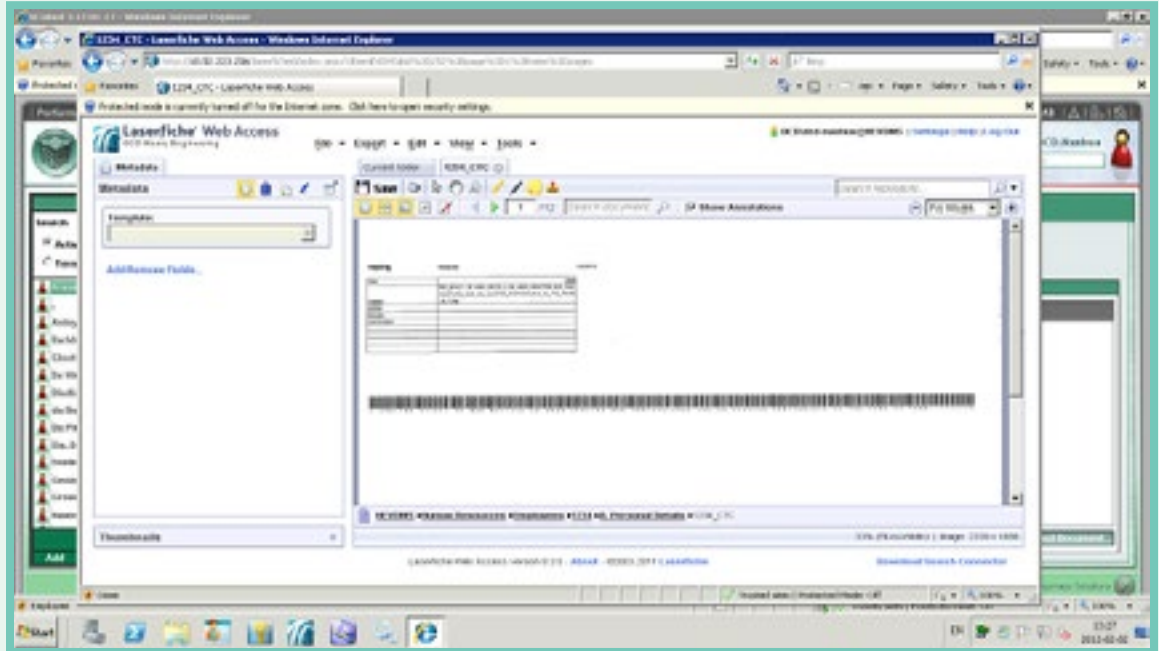


- ▶ Laserfiche Workflow automatically files the contract in the individual's folder in the Laserfiche repository. If the folder doesn't exist, it is created.



## THE LASERFICHE – SCUBED INTEGRATION

In DCD Group's HR department, Laserfiche is integrated with the Scubed human capital management system. From within Scubed, an HR employee can click on an employee's name and the associated folder is automatically opened in Laserfiche Web Access.



Laserfiche has been set up to use Windows Authentication so that employees do not need to remember yet another user name and password when logging in.



## **BENEFITS OF LASERFICHE**

Implementing Laserfiche in the HR department at DCD Group has resulted in the following benefits:

- ▶ Time to onboard a new employee was reduced from 45 minutes to 15 minutes.
- ▶ All employee files are now centrally located and multiple copies of the same document no longer need to be printed.
- ▶ Employee files can be accessed directly within the Scubed human capital management system with Laserfiche Web Access.
- ▶ Administrative work to onboard a new employee was cut by 50%.

# EMPLOYEE ONBOARDING

**Job Functions:** Human Resources Managers, Human Resources Assistants,  
Department Managers

**Business Process:** Onboarding New Employees

Reviewing paper job applications can be time-consuming for HR recruiters. This article outlines how to configure Laserfiche Forms to make the hiring process more efficient.



*Paperless employment applications ease the hiring process.*

## THE PROCESS

The hiring process begins when a job opening is posted on the company's website. The link to the electronic application form created with Laserfiche Forms is embedded in the job description.

When a prospective applicant clicks the link, she is presented with the employment application:

The screenshot shows a web form titled "LaserWorks Application for Employment". At the top, there is an orange header with the text "LaserWorks Application for Employment". Below the header, there is a paragraph of text: "LaserWorks is an equal opportunity employer. It considers applicants for all positions without regard to race, creed, color, gender, pregnancy or related condition, age, national origin, disability, medical condition (including genetic characteristics), marital, domestic partner or veteran status, religion, sexual orientation, or any other characteristic protected by state, federal or local laws." Below this text is a section titled "Personal Information" with a small circular icon containing an upward-pointing arrow. The form contains several input fields: "Last Name\*" (required), "First Name\*" (required), "Main Phone Number\*" (required), "E-mail Address", "Residence Address\*" (required), "Street Address", "Address Line 2", "City", and "State / Province / Region".

The applicant fills out the application. The fields marked with asterisks are required.

At the end of the application, the applicant can upload a cover letter and resume. If the job posting requires additional documents (e.g., writing samples), she can upload those as well.

The applicant does not need to complete and submit the form in one session. She can save the form as a draft and complete it later. Once everything is filled out, the applicant simply clicks "Submit."

**Signature of Applicant\***  
 Amy Applicant  
 Please type your full name here as your signature.

**Date**  
 4/29/2014

**Additional comments**

Save unfinished form to complete later

Enter your e-mail address:

Create a password:

The form and supplemental documents are routed to the recruiter, who inspects the application to see if the candidate might be a good fit for the job. If this is the case, the recruiter can assign the application to a departmental manager. The recruiter can also leave comments for the manager, such as the notes from a phone screening.

**For HR Use Only**

**Route to Manager\***  
 Stephen Sales

**Additional comments**  
 Amy seems perfectly qualified for this job. She's a recent graduate with excellent qualifications and a great personality.

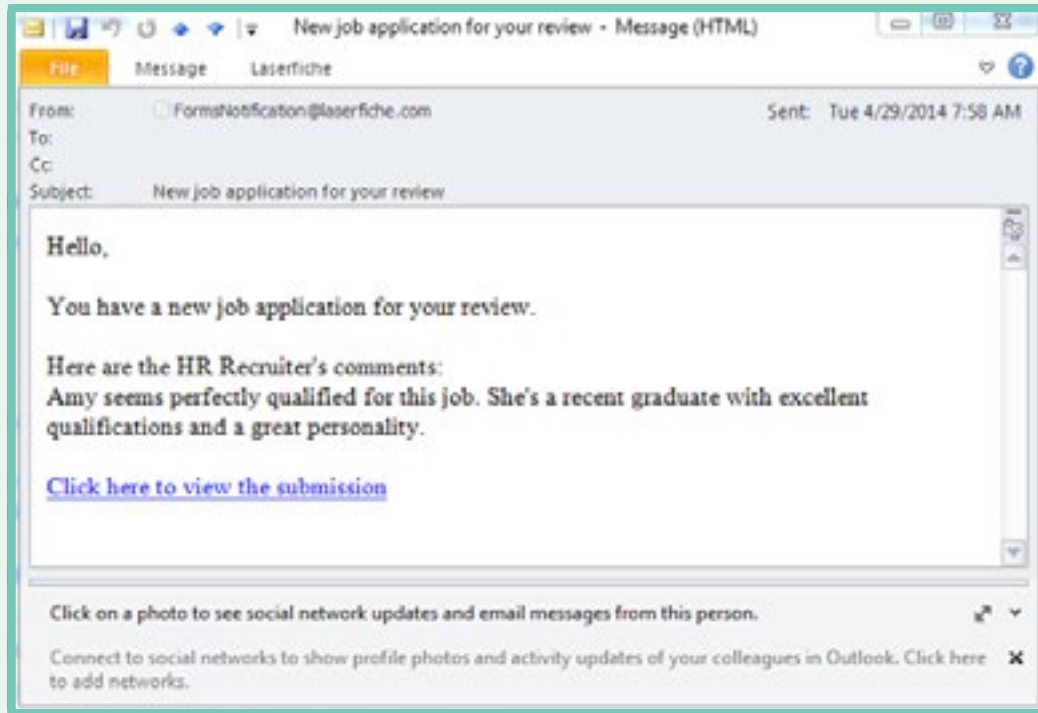
**Actions for HR Initial Application Review**

Comments



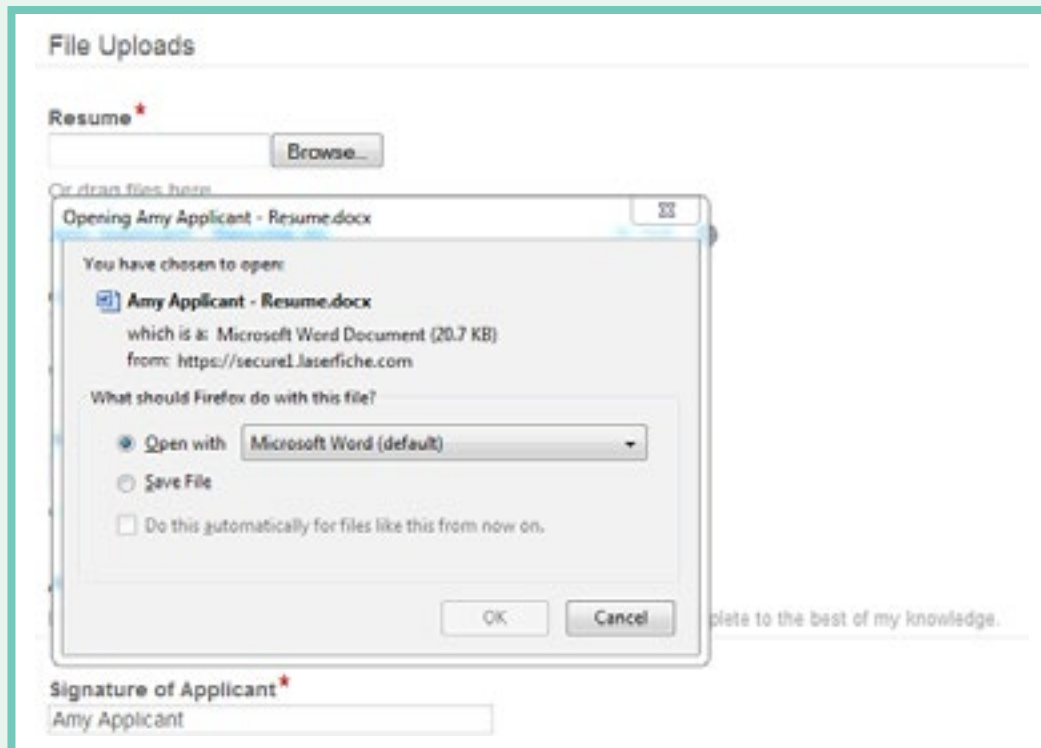


If the application is approved by the recruiter, an email is automatically generated and sent to the department manager notifying him of a new application for his review.

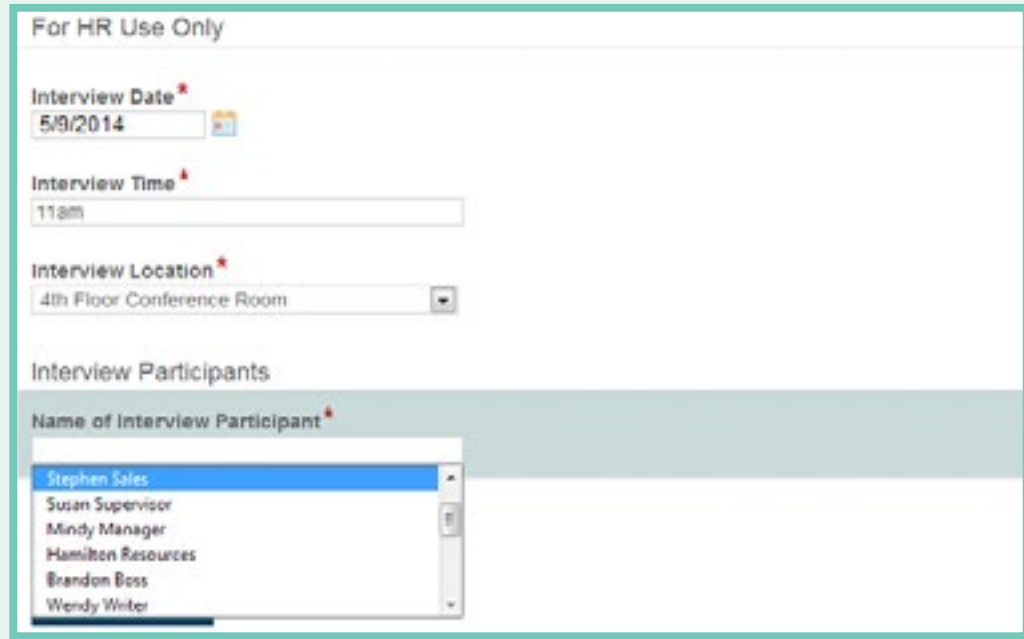


If the manager doesn't review the application in three business days, he'll get another email reminder.

The department manager can look through the application and download the candidate's resume by clicking the resume link.



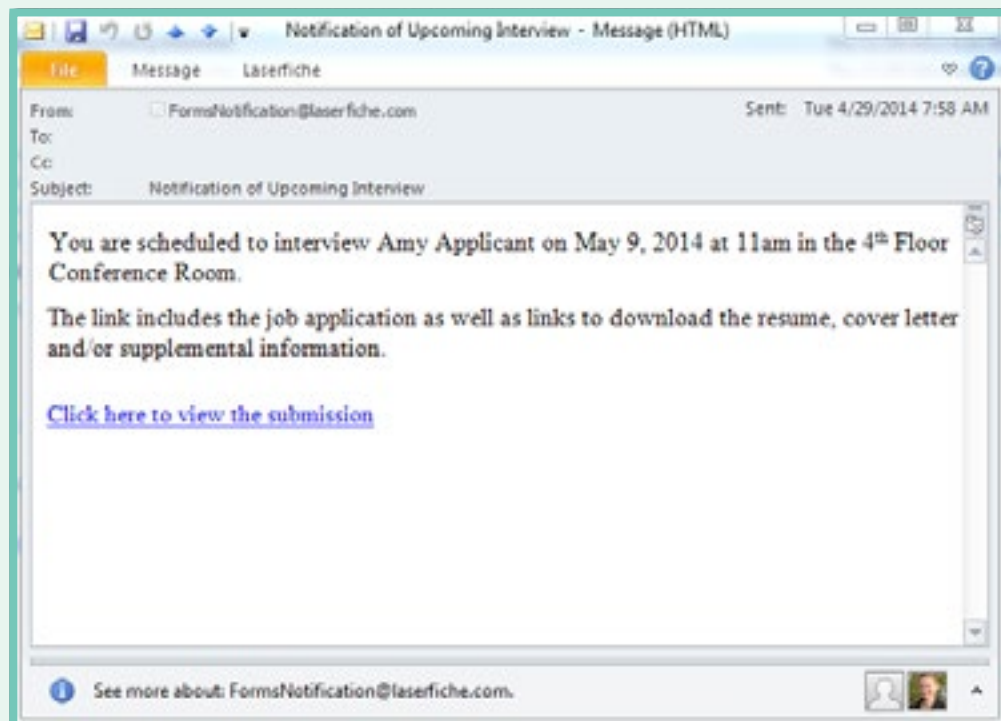
If the department manager decides that he would like to interview the candidate, he clicks “Schedule Interview.” This alerts the recruiter to schedule an interview with the candidate. The recruiter notes the date, time and location of the interview on the form, along with the interviewer’s name. In order to simplify this task, the field prompts the user with company employee names.



The screenshot shows a web form titled "For HR Use Only" with the following fields:

- Interview Date\***: 5/9/2014
- Interview Time\***: 11am
- Interview Location\***: 4th Floor Conference Room
- Interview Participants**: A dropdown menu titled "Name of Interview Participant\*" with the following options: Stephen Sales (selected), Susan Supervisor, Mindy Manager, Hamilton Resources, Brandon Boss, and Wendy Weber.

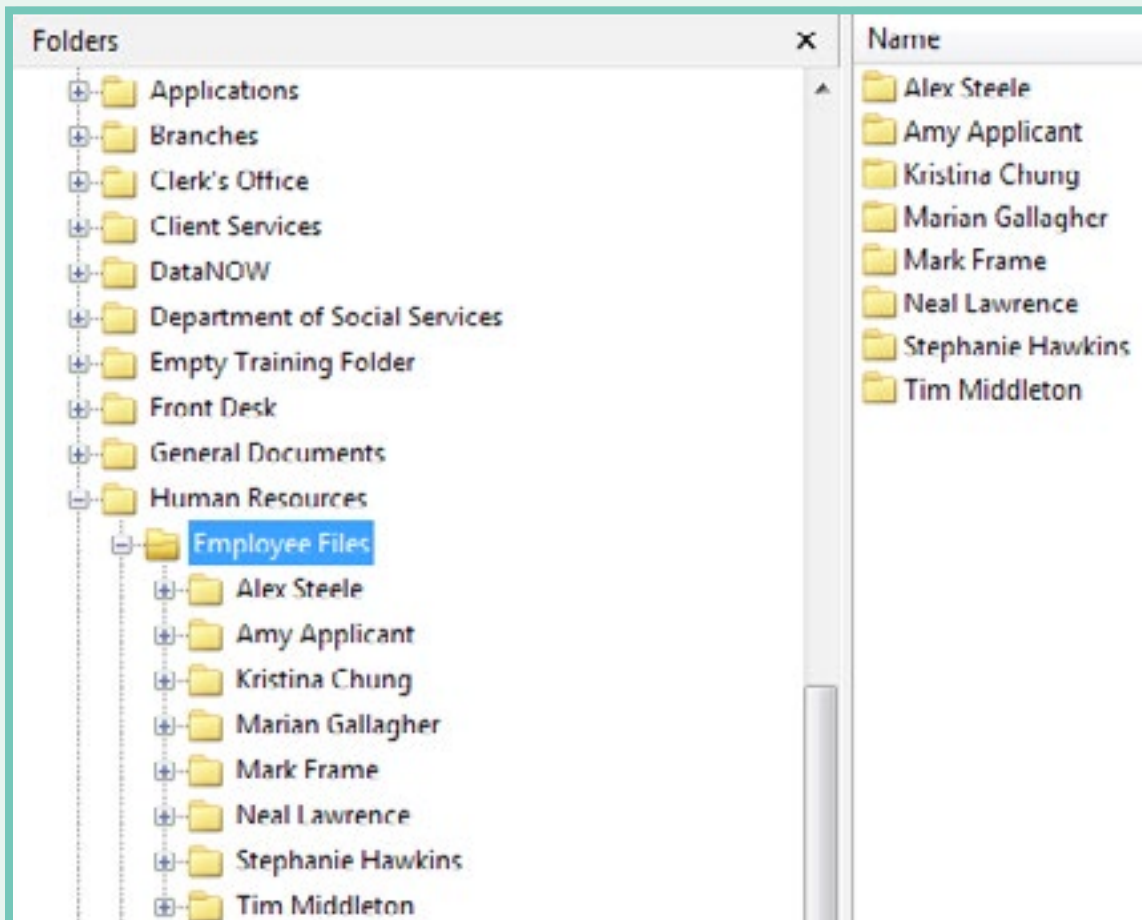
Once the interview is scheduled, the recruiter clicks “Interview Scheduled.” This action generates an email to the interviewer that includes interview information as well as a link to the original job application.





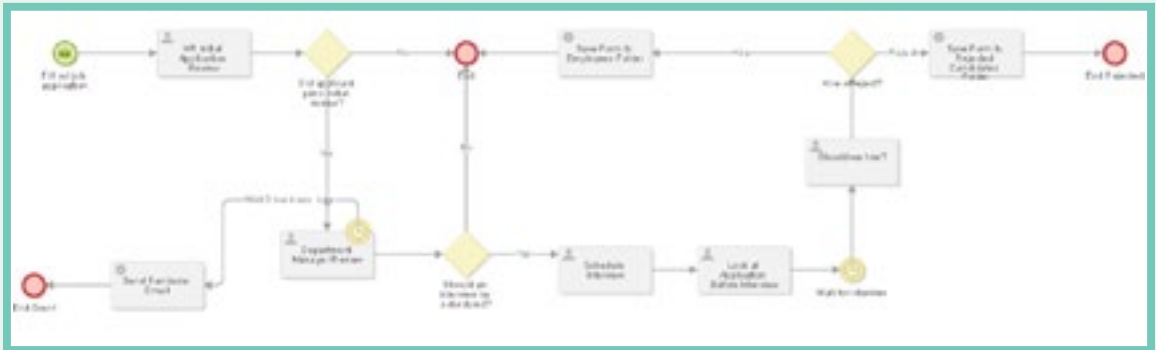
The interviewer can view the information, download associated files and print any he'd like to have on hand during the interview. When finished, he clicks "Application Viewed." After the interview, the hiring manager receives an email with a link to the form, where he can hire or reject the candidate.

If the applicant is hired, the application and supplemental information are saved to a newly created employee folder. Otherwise, the application is routed to a "Rejected Candidates" folder for storage.



## WHAT IS GOING ON BEHIND THE SCENES

The entire business process is mapped out in the Laserfiche Forms Process Modeler.



The process starts when a user fills out the job application on the website. After that, each action taken by an employee is represented by a user task. Here is what the “Department Manager Review” user task looks like.

Every user task deals with a particular form. This process uses three different forms.



Information from the original job application is copied to the forms that the recruiter and department manager will review, along with other fields specific to those users. For example, the form that the recruiter sees when reviewing the application is not the original job application form but the job application form with the special “For HR Use Only” appended to the bottom.

For HR Use Only

Route to Manager\*

Additional comments

Each form field has a specific variable associated with it. This variable contains the information that is entered into the field. For example, the “First Name” field has a corresponding variable called “First\_Name.”

First Name\*

Done Duplicate Delete

Main Phone Number Basic Advanced

E-mail Address

Residence Address

Street Address

Address Line 2

City

Postal / Zip Code

If employment is and legal right to

Yes No

Position Info

Position Desired

Field label

First Name

Required  Read-only

Variable

First\_Name

Text above field

Text below field

Field width

medium

Character limit

Default value

For example, when creating the form that the recruiter sees when reviewing the application, instead of inserting a regular field and calling it “First Name,” we can simply insert the “First\_Name” variable. This ensures that that the field will contain the same information entered in the original job application when the recruiter views it.

In order to simplify the new form creation process, we can also copy the form, rename it and then add the “For HR User Only” section on the bottom. Forms can be copied directly from within the Form Designer.

In the Laserfiche Forms Process Modeler, decisions are denoted by gateways, such as this “Did applicant pass initial review?” gateway.

### Exclusive Gateway

---

**Name**

**Gateway type**

◇ Exclusive Gateway ▼

A decision where one outflow path with satisfied conditions is taken. [Learn More](#)

**Outflow**

After this object, the process will proceed to one or more of the destinations listed below based on conditions you specify. [Learn More](#)

Destination	Name	Path Conditions
End	<input style="width: 100%;" type="text" value="No"/>	<input type="checkbox"/> This is the default outflow path. <input style="width: 100%;" type="text" value="/dataset/_action='Reject'"/>
Department Manager Review	<input style="width: 100%;" type="text" value="Yes"/>	<input type="checkbox"/> This is the default outflow path. <input style="width: 100%;" type="text" value="/dataset/_action='Approve'"/>

Done
Cancel



Once the application has passed the recruiter's initial review, it is sent to the department manager for review. If the manager doesn't review it within three business days, he'll get a follow up email. This is accomplished by attaching an intermediate timer to the Department Manager Review user task. Here is how this timer is configured:

### Intermediate Timer Event

Name

This event monitors the attached activity. If the activity has not been completed after a certain length of time, the intermediate timer event's outflow path will be taken. [Learn More](#)

Wait

For

3 days 0 hours 0 minutes

Exclude weekends

Interrupt the attached activity

Done Cancel

Another intermediate timer event occurs before a hiring decision is made. This timer event reminds the HR manager a day after the interview to make a decision about the candidate.

### Intermediate Timer Event

Name

An intermediate timer event delays a process flow. [Learn More](#)

Wait

Variable

1 days after variable Interview\_Date

Exclude weekends

Done Cancel

Once the HR manager decides if the candidate should be hired or rejected, the candidate's job application and all supplemental files are saved in the Laserfiche repository with the Save to Repository service task. This task also allows the user to specify the template and fields that will be appended to the submission in Laserfiche. Since the files for hired and rejected applicants are saved in different folders, this HR onboarding process uses two Save to Repository tasks. Here is what the task for hired candidates looks like:

### Save to Repository

---

**Name**

**Type**

Save to Repository

Saves the specified form to a Laserfiche repository. [Learn More](#)

---

**General**    Outflow

---

**Repository profile**

Inhouse

+ New Profile
Edit Profile

**Form**

Job Application - HR Schedule Interview

Cover\_Letter

Resume

[Supplemental\\_information](#)

---

**Document name**

**Path**

**Volume**

<Use parent folder's default volume>

**Save options**

Save as PDF

Include action history

Save business process data as XML

**Fields**

Configure Fields

**Parent folder fields**

Configure Fields





## BENEFITS OF LASERFICHE FORMS

Some benefits of automating your hiring process with Laserfiche Forms include:

- ▶ Job applications are always legible and complete, since required fields prevent important information from being omitted.
- ▶ Applications can be quickly and seamlessly passed to various employees for review. Because forms can be viewed easily on desktops, laptops and mobile devices, managers can review and act on them from any location.
- ▶ Administrators can easily see the status of each application, allowing them to quickly eliminate bottlenecks.

# EMPLOYEE ONBOARDING: EDGEWOOD INDEPENDENT SCHOOL DISTRICT

**Industry:** Education – School Districts

**Number of Employees:** 1,001 – 5,000

**Headquarters:** San Antonio, TX

At Edgewood Independent School District (EISD), teachers, staff and administrators were used to filling out a paper form for anything from requesting time off to requesting funds for a classroom pizza party. Here is how EISD eliminated more than 200 different types of paper forms and made approval processes more efficient with Laserfiche Forms.



*Adam Galvan, Technology Director, describes Edgewood Independent School District's widespread use of Laserfiche Forms.*

## LASERFICHE FORMS HAS MORE THAN 200 USES AT EISD

Laserfiche Forms is used throughout the entire district. Here are just a few different ways that EISD uses Laserfiche Forms:

- ▶ Administrators use Laserfiche Forms to request new construction projects.
- ▶ Safety and security officers use Laserfiche Forms for alarm code authorization requests.
- ▶ The EISD police department uses Laserfiche Forms to report truant students.
- ▶ Athletic event personnel fill out their timesheets in Laserfiche Forms on-site during sports events and submit them via their iPads.
- ▶ Teachers use Laserfiche Forms to request funding for pizza parties.
- ▶ New employees use Laserfiche Forms to enroll for benefits.
- ▶ Employees submit their resignation or retirement requests with Laserfiche Forms.
- ▶ The human resources department uses Laserfiche Forms for requesting new positions.
- ▶ Staff uses Laserfiche Forms to submit and approve travel settlements.

Here is an example of a form that is used to request new positions:

**HR- PR Form**

**Part A (Check Applicable Boxes and Provide Information Requested)**

Campus/Dept:

Campus/Dept Name:

Funding Source:  Yes  No

Job Category:  Teacher  Professional/Ministrative  Para/Professional  Auxiliary  Temporary  
 Part-Time  Full-Time  Substitute  Ending

New Position:  Yes  No

Beginning Date:

Ending Date:

Pay Grade:  All  AP  PD  ALK  IS  PD  ST  PL  
(If Applicable)

**Part B (Check applicable categories and provide information requested)**

Categories:  Replacement  Delete Position  New

Specify Student Ratio:

Teaching Unit Only:   
\*Total Number of Students currently enrolled

**Complete Budget Information for Position Requested**

Budget Information:  REG  ST/COMP  SP/ED  BL  MOC  TITLE I  
 Other:

Budget Number:

Include all budget account numbers and percent of funding:  %

URL:

Save unfinished form to complete later

## LASERFICHE FORMS AS PART OF A BUSINESS PROCESS

A number of forms used at EISD need to go through an approval process. Principals, directors, academic officers and business/operations officers are all involved in these approvals and have administrative rights to access tasks assigned to them.

Some of the review/approval processes require signatures of approval. For each section that requires a signature, EISD has incorporated a line item where the submitter must enter the last four digits of his or her social security number as a replacement of the physical signature.

### Fingerprinting Acknowledgement

By signing below, I hereby acknowledge that I understand that, as a non-certified employee hired on or after January 1, 2008, I must submit my fingerprints and identification information to the Texas Education Agency (TEA) and the Department of Public Safety (DPS) before beginning employment. I also acknowledge that I understand that, at the discretion of the District, I may be allowed to begin work before the fingerprint process is complete. I further acknowledge that I understand that my continued employment is contingent on the results of my criminal history report. I understand that if the TEA finds that I am ineligible for employment under the provisions of the Texas Education Code (TEC) § 22.085, I must be discharged by the District. In addition, I understand that a criminal history information clearinghouse will be created that will provide updates of any subsequent criminal record. I understand that based on information in the clearinghouse record, TEA will certify to the District whether I am eligible for continued employment. If I should be found to be ineligible for employment based on a subsequent criminal record, I understand that the District must discharge me immediately from my employment. In addition to the foregoing information, I understand that, before being offered employment by the District, I must be cleared by a name-based criminal background check based on the District's own employment requirements. I also understand that the District may discharge me from employment if I fail to disclose in my employment application a conviction of any felony, or misdemeanor involving moral turpitude. TEC § 22.085 (d)

**Last 4 of Social Security**

**Date**

Once a form has been submitted, Laserfiche Workflow applies a digital signature corresponding to the name of the approver. We added signature certificates for each principal, director, academic officer and operations officer.

**Metadata**

Fields	Tags	Links	Versions	Signatures: 3
--------	------	-------	----------	---------------

Signed By: MHS Admin  
Signed DateTime: 11/1/2013 8:41:45 AM  
Reason:

---

Signed By: ChiefAcademic Admin  
Signed DateTime: 11/1/2013 8:41:45 AM  
Reason:

---

Signed By: Supr.Admin  
Signed DateTime: 11/1/2013 8:41:45 AM  
Reason:



### EXAMPLE: HUMAN RESOURCES

Every form used by the human resources department is part of a larger business process. Here is an example of the HR-Processing Packet form that initiates the new employee onboarding process.

**HR- Processing Packet- Admin**

**New Hire Data**

Social Security Number

Employee Number

First Name

Middle Initial

Last Name

Maiden Name

Generation  Jr  Sr  III  IV  V

Date of Birth

**Home Address**

Street Address

Address Line 2

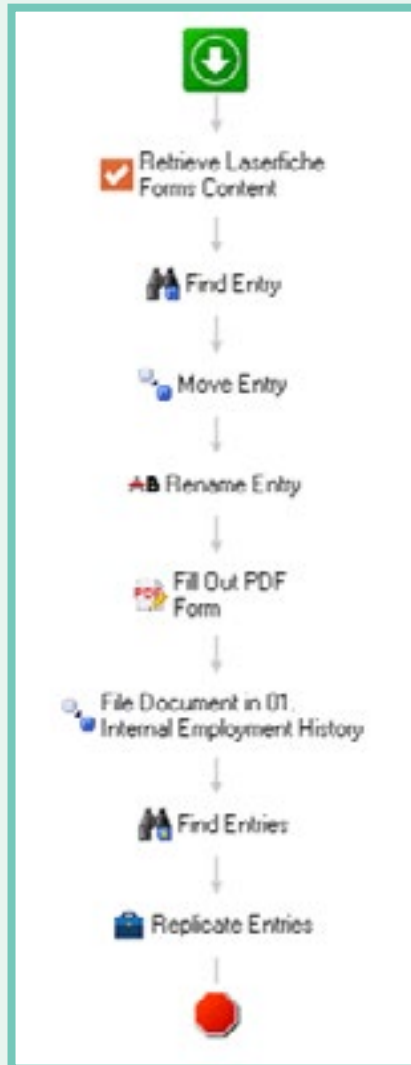
City  State / Province / Region

Postal / Zip Code  Country

Once the employee has submitted the form, it is automatically sent to an HR specialist for review and approval. The HR specialist makes any necessary changes before approving and submitting the form. This action triggers Laserfiche Workflow.

Laserfiche Workflow populates the standard EISD HR processing PDF form with the data extracted from Laserfiche Forms and stores it in a new folder in Laserfiche.

Here is what this workflow looks like:



Not all paperwork that a new employee must fill out can be electronic. One example of this is certain tax forms. The employee fills out and signs the tax forms by hand. An HR specialist then scans them directly into Laserfiche. He then selects the type of form from a field in the template that routes the tax forms to the employee's folder in Laserfiche.



## ADVICE FOR USING LASERFICHE FORMS

Here are some suggestions to help with migrating paper forms to Laserfiche Forms:

- Consolidate several paper forms into one Laserfiche form by using the rules to make certain sections appear only if particular criteria are met.

The screenshot displays two configuration panels for conditional display rules in Laserfiche Forms. Panel 1 is titled '1 Available Sources' and 'JobCodes'. It contains a rule where the 'When' condition is 'First Letter of JOB' matches with data source column 'First Letter', and the 'If' condition is 'JOB Code Name' with data source value 'JOB Code'. Panel 2 is titled '2 Available Sources' and 'CAMPUSDEPT'. It contains two rules: the first where 'When' is 'New CAMPUS/DE' matches with data source column 'TYPE' and 'If' is 'CAMPUS/DEPT N' with data source value 'NAME'; the second where 'When' is 'Present CAMPUS' matches with data source column 'TYPE' and 'If' is 'CAMPUS/DEPT N' with data source value 'NAME'. Each rule has expand/collapse icons.

- ▶ Simplify forms completion by using database lookups. Prompt the user to enter his ID and configure the system to populate other information such as name and job title directly from the database. This can reduce data entry errors and make filling out forms faster. For example, any form that is filled out by an EISD employee populates the employee's name and other identifying information based on the employee number entered.

The screenshot displays a web-based configuration interface. At the top, there are buttons for '+New Data Source', 'Update', 'Test', and a trash icon. The interface is divided into several sections:

- Data Sources:** A table with columns for 'Server', 'Database', and 'Account'. The current entry shows 'localhost' for the server, 'LFDynamicFields' for the database, and 'eisd\asrferfchc' for the account.
- Tables and Columns:** A list of database objects including 'CAMPUS/DEPT', 'Forms-Dept/Campus', 'JobCodes', 'Vendors', and 'Stored Procedures'.
- Processes:** A list of system processes with checkboxes, including 'AP- Consultant Evaluation Report', 'AP- Mileage Reimbursement', 'AP- Travel Settlement', 'ATH- Officials / Support Personnel's Payment Va', 'FS- Field Trip Lunch Request', 'FS- Pizza Party Reservation', 'HR- Admin Pkt', 'HR- Final Applicant Rating (old)', 'HR- Interview Questions', 'HR- Interviewing Pkt', 'HR- New Hire Form', and 'HR- Para Aides Pkt (103)'.





## **BENEFITS OF LASERFICHE FORMS**

Migrating all of the district's paper forms to Laserfiche Forms and Laserfiche Workflow has resulted in the following benefits for EISD:

- ▶ Form submitters can see where in the review/approval process their form is at all times.
- ▶ Reviewers and approvers are notified by email of pending tasks so that they are able to act on them immediately.
- ▶ Everything is stored in one central location and can be accessed by anyone with the appropriate permissions.
- ▶ Users can easily fill out and submit forms from a mobile device when they are out of the office or classroom.

# EMPLOYEE POLICY ACKNOWLEDGMENT

**Job Functions:** Human Resources Managers, Compliance Officers  
**Business Process:** Acknowledging Employee Policies

Employees who work at Laser Funds, a financial services company, must abide by many company policies to comply with federal regulations. In most cases, each employee must review and approve these policies regularly—either annually or semi-annually. Laser Funds automated the policy acknowledgment process by integrating Laserfiche WebLink and Laserfiche Forms.



*Integrate Laserfiche Forms with Laserfiche WebLink to make approving company policies easy.*

## THE PROCESS

When it is time for an employee to review and approve a particular policy, he receives an email with a link to the Laser Funds Employee Policy Acknowledgment form.

The screenshot shows a web form titled "Laser Funds Employee Policy Acknowledgment". At the top, there is a green header bar with the title. Below the header, there is a section with a label "Select a Policy:" followed by a dropdown menu. Below that is a text input field labeled "Policy ID:". The main content area is a large white box with a thin border, containing the text "Please select a policy or procedure to display." in a large, bold, black font. Below this box, there is a text input field labeled "Employee Name". Underneath that is a section labeled "Acknowledgment" with a red asterisk. It contains the text "I certify that I am the employee listed above and that I have read the selected policy." followed by two radio button options: "I agree with the policy." and "I disagree with the policy.". At the bottom left of the form is a green "Submit" button.

After the employee selects the appropriate policy from the “Select a Policy” drop-down list, the policy document appears in the window below. The read-only “Policy ID” field is automatically populated with the document’s Laserfiche entry ID.

### Laser Funds Employee Policy Acknowledgment

Select a Policy: \*

Policy ID:

**Conflict of Interest Policy**

As an employee, you are expected to act at all times in the Corporation's best interests and to exercise sound judgment unclouded by personal interests or divided loyalties. Both in performing your duties at Corporation and in your outside activities, you should avoid the appearance as well as the reality of a conflict of interest.

A conflict of interest exists if your circumstances would lead a reasonable person to question whether your motivations are aligned with the Corporation's best interests. If, for example, you are involved in an outside activity or have a financial or other personal interest that might interfere with your objectivity in performing company duties and responsibilities, you may have a conflict of interest.

While it is impractical to describe all situations that may create a conflict of interest, the following provides policy guidance about some of the most common conflict of interest situations:

- Use of Company Information for Private Gain
- Friends and Family Stock
- Outside Activities – Non-Profit and Civic Organizations
- Employment Outside Corporation - Moonlighting
- Service on a Board of Directors

Employee Name \*

Acknowledgment \* I certify that I am the employee listed above and that I have read the selected policy.  
 I agree with the policy.  I disagree with the policy.



The employee can read the document directly from the form or export it as a PDF. After reading the document, he signs the form by filling out the “Employee Name” field and certifies his agreement or disagreement by checking the appropriate box.

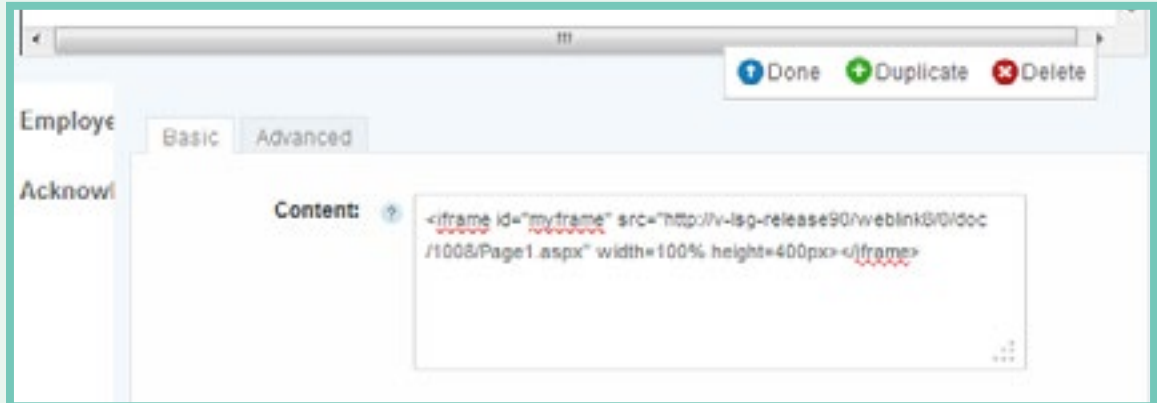
The screenshot shows a web form with a light green background. At the top, there is a text input field labeled "Employee Name" with a red asterisk, containing the text "John Doe". Below this is a section labeled "Acknowledgment" with a red asterisk. It contains the text "I certify that I am the employee listed above and that I have read the selected policy." followed by two radio button options: "I agree with the policy." (which is selected) and "I disagree with the policy." At the bottom left of the form is a dark green "Submit" button.

Once the form is submitted, it is saved in the Laserfiche repository. Form data can be stored in a SQL database so administrators can track who has submitted forms and when they were submitted for auditing purposes.

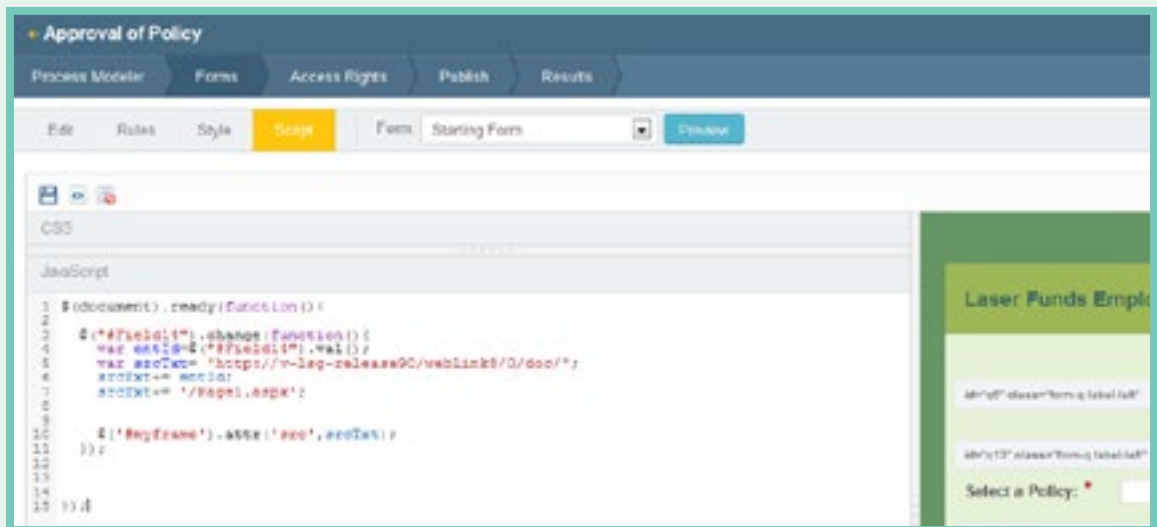
If the employee does not agree with the policy, the compliance department is notified via email so it can address the issue directly with the employee.

## BEHIND THE SCENES

In Laserfiche Forms, a Custom HTML field contains an iframe that links to Laserfiche WebLink, allowing users to view policy documents available in WebLink from within the form.



Custom JavaScript on the Script page of the Form Designer loads one of several different documents based on the selection in the "Select a Policy" drop-down field.

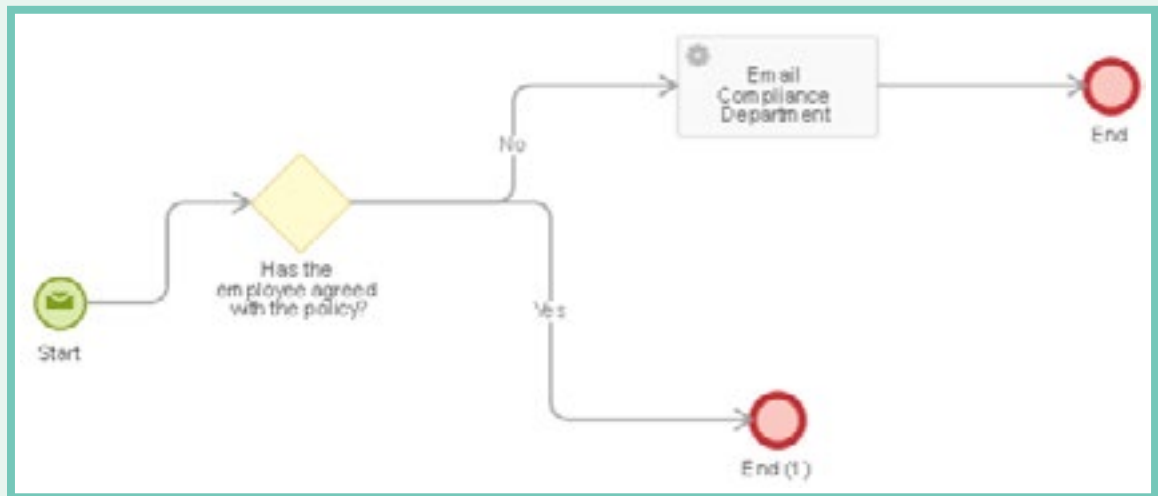




The “Policy ID” field, which is used in the script to select the correct Laserfiche policy to display, corresponds to the document’s Laserfiche entry ID. This field is populated by a database lookup into a custom SQL view (configured on the Rules page of the Form Designer).

The screenshot shows the 'Approval of Policy' form designer interface. At the top, there is a navigation bar with tabs for 'Process Modeler', 'Forms', 'Access Rights', 'Publish', and 'Results'. Below this, there are tabs for 'Edit', 'Rules' (highlighted in yellow), 'Style', and 'Script'. A 'Form:' dropdown menu is set to 'Starting Form', and a 'Preview' button is visible. The main area has two tabs: 'Page rules' and 'Lookup rules'. A text box states: 'Information can be retrieved from an external SQL database and inserted into form fields.' Below this are 'Save' and '+ New Lookup Rule' buttons. The configuration section shows 'Available Sources: v-lsg-sql FormsLo' and 'Table: FORMSNames'. A 'Match' rule is defined: 'Select a Policy:' with a dropdown arrow, 'with data source column name' with a dropdown arrow. Below this, a 'Fill' rule is defined: 'Policy ID:' with a dropdown arrow, 'with tocid' with a dropdown arrow. There are plus and minus icons for adding and removing rules.

The process is configured in the Laserfiche Forms process modeler.



An Email Service Task is used to configure the email to the compliance department.





## **BENEFITS OF INTEGRATING LASERFICHE FORMS WITH LASERFICHE WEBLINK**

Simplifying the employee policy acknowledgment process with Laserfiche Forms and Laserfiche WebLink resulted in the following benefits for Laser Funds:

- ▶ Employees do not have to navigate through multiple documents. They can simply read and acknowledge all policies from one form.
- ▶ Compliance officers are immediately notified if an employee disagrees with a policy and can follow up right away.
- ▶ Employees will always see the most updated version of the policy.

# PAPERLESS EMPLOYEE EVALUATIONS

**Job Functions: Human Resources Managers, Department Managers**  
**Business Process: Evaluating Employees**

Managers regularly evaluate the performance of their employees. These performance evaluations involve paperwork and approvals by various parties, including employees, managers and higher-level personnel. Here is how a sheriff's office made daily performance observations of probationary deputies fully paperless with Laserfiche Forms.




*Managers: Learn how to streamline employee performance observations with Laserfiche Forms.*

## DAILY OBSERVATION REPORT

In order to make sure that new sheriff's deputies are proficient in their jobs, observing their performance is crucial. During the probationary deputy's field training, a field training deputy (FTD) evaluates him daily.

Instead of manually filling out a paper form at the end of each workday, the FTD now logs into the sheriff's intranet from the office or his patrol car to access a Daily Observation Report created in Laserfiche Forms.



Sheriff L. L. Fishe

OFFICE OF  
**Sheriff of Laser County**

---

**Administration - Detention**  
3545 Long Beach Blvd.  
Long Beach, CA 90807  
(562) 181-2000

**Operations**  
1234 Cherry St.  
Long Beach, CA 90807  
(562) 181-2281

---

### Field Training Program - Daily Observation Report

**Probationary Deputy\***

**Date\***

**Field Training Deputy\***

**Shift\***

1st Shift ▾

### RATING

*Rating Instructions: Rate observed behavior with reference scale below. A comment is required on all ratings of "1" and "5", check "NO" if not observed. Add Case Number if generated. Record any Additional Training if conducted.*

ATTITUDE	RATING SCALE	SEG	A T*	CASE #
1. Acceptance of criticism	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> NO	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N	<input type="text"/>
2. Toward the public/interaction	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> NO	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N	<input type="text"/>
3. Toward work	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> NO	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N	<input type="text"/>
4. Toward peers	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> NO	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N	<input type="text"/>
5. Toward FTD/Supervisors	<input type="radio"/> 1 <input type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4 <input type="radio"/> 5 <input type="radio"/> NO	<input type="text"/>	<input type="radio"/> Y <input type="radio"/> N	<input type="text"/>

The FTD fills out the form, rates the probationary deputy in a number of categories and indicates whether the deputy needs additional training (A.T.) in any particular category. If additional training is required, a new field appears on the form asking for more details about this training.

**The performance required additional training, please explain and describe the plan and list the amount of A.T:**

If additional training isn't required, the field remains hidden.

After the FTD submits the form, an email with a link to the form is sent to the probationary deputy. The deputy can make changes to the form and add comments before submitting.

**Probationary Deputy Comments:**  
I agree with everything and will attend the A.T.

**Field Training Deputy Comments:**  
Besides the interview and interrogation skills, deputy Smith is doing very well.

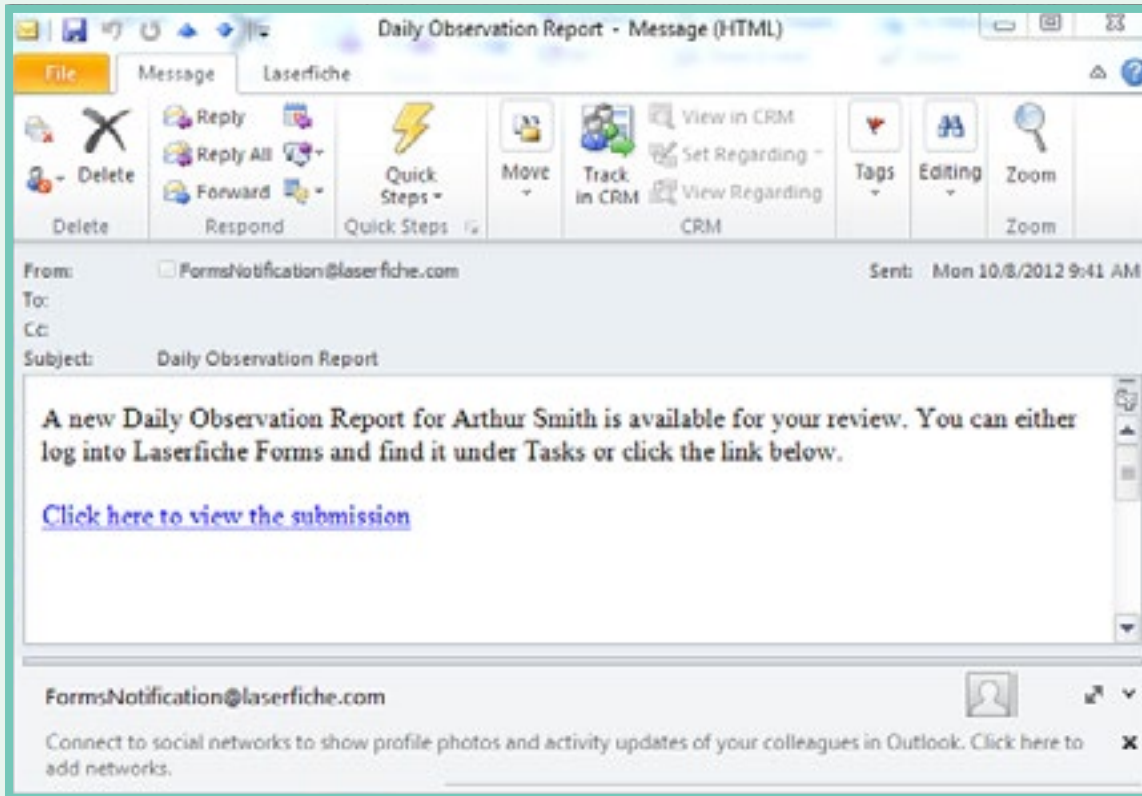
**List training briefs covered today:**  
Interrogation and interview.

**Approval Actions for Probationary Deputy**

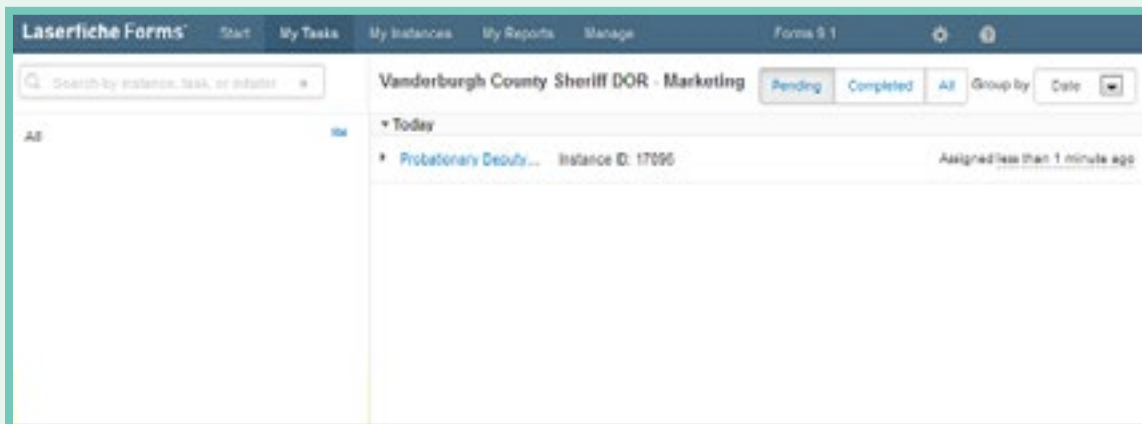
Comments



Once the probationary deputy submits the form, the FTD supervisor is notified by email that he has a new Daily Observation Form to approve.



The FTD supervisor can click the link or log into Laserfiche Forms and go to "My Tasks" to view the form.



He cannot make any changes to the form, but can add his own comments and approve or reject the form. If approved, the form is sent to the FTD coordinator for review and approval. Like the FTD supervisor, the FTD coordinator cannot make changes to the form, except to add comments at the end.

**Probationary Deputy Comments:**  
I agree with everything and will attend the A.T.

**Field Training Deputy Comments:**  
Besides the interview and interrogation skills, deputy Smith is doing very well.


**List training briefs covered today:**  
Interrogation and interview.

**Approval Actions for FTD Coordinator Review**

Comments

Approved.

After review by the FTD coordinator, the completed form is routed to a specific folder in the Laserfiche repository for storage.

Name	Pages	Indexed	Creation Date	Last Modified
 Daily Observation Report	3	Yes	10/8/2012 9:36:52 AM	10/8/2012 10:07:57 AM



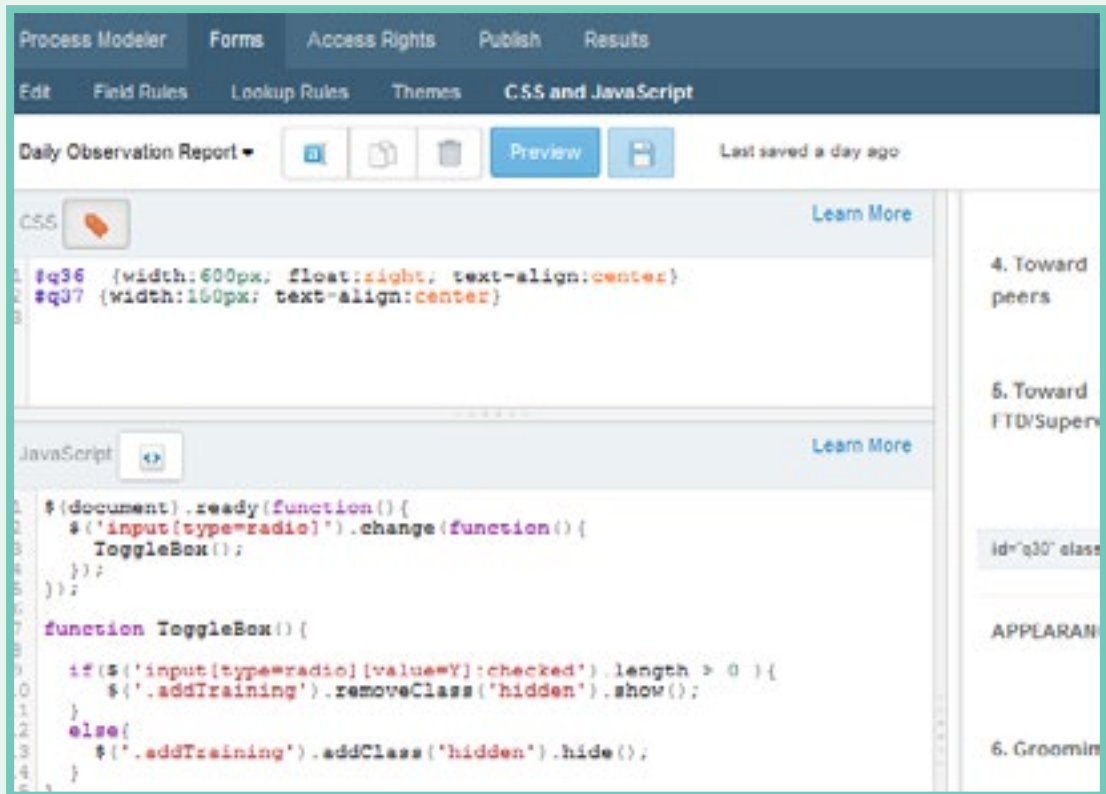
## WHAT IS GOING ON IN THE BACKGROUND

This entire business process is enabled by Laserfiche Forms. The form is designed in the Form Designer.

The screenshot shows the Laserfiche Form Designer interface for a form titled "Daily Observation Report". The interface includes a top toolbar with icons for undo, redo, save, and print, along with buttons for "Preview" and "+ New Form". A status bar indicates "Last saved 42 minutes".

The main workspace is divided into two panels. The left panel, titled "Fields", contains a list of form elements: Single Line, Multi-line, Radio Button, Checkbox, Drop-down, File Upload, Address, Number, Email, Date, Currency, Custom HTML, Section, Collection, and Table. The right panel displays the form design, which includes a large text area at the top, followed by a section titled "The Weakest Area of performance today was the rating category" with a text input field. Below this is a section titled "Location of event and/or case number" with another text input field. The next section is "Specific incident which demonstrates today's performance in this area" with a large text area. The final section is "Documentation of Performance and Comments", which contains a "Category #" text input field and a "Description/Comments" text area.

In order to create the dynamic fields—so that a field appears if additional training is selected—the sheriff’s office used custom JavaScript code that can be added in the “CSS and JavaScript” page when creating a form.



This code relies on the presence of the “addTraining” CSS class on the Additional Training field. Be sure to add the appropriate CSS class to your fields or the code won’t work. More information can be found in the Laserfiche Forms online help files.

It is possible to create the dynamic fields without code on the “Field Rules” page, but since that would require one rule per radio button, in this case JavaScript is more efficient.

The whole process is mapped out in the Laserfiche Forms Process Modeler.







After the form is reviewed, Laserfiche Forms routes it to its final storage place in the Laserfiche repository. A Save to Repository service task is used to specify the location in Laserfiche where the file will be stored along with the template and fields that should be assigned to it.

Saves the specified form to a Laserfiche repository. [Learn More](#)

**General**    Outflow

---

**Repository profile**

Inhouse

**Form**

Daily Observation Report

**Document name**

{/dataset/\_form\_name} {/dataset/\_initiated\_time}

**Path**

DOR Reports

**Volume**

<Use parent folder's default volume>

**Save options**

Save as

Include action history

Save business process data as XML

**Fields**

**Parent folder fields**



## BENEFITS OF LASERFICHE FORMS

Some benefits of automating the employee performance evaluation process with Laserfiche Forms include:

- ▶ Since forms can be filled out on mobile devices, evaluations can easily be completed in the field and immediately submitted for review.
- ▶ Performance evaluations get processed quickly since they can be reviewed and approved even when a reviewer is out of the office.
- ▶ The process is transparent to everyone involved. Both the manager and employee can view a copy of the evaluation by simply logging into Laserfiche Forms.

# TRAVEL REQUESTS

**Job Functions:** Human Resources Managers, Department Managers, Travel Coordinators  
**Business Process:** Processing Travel Requests

Most organizations require certain employees to travel on business. Learn how to streamline and expedite the travel request process using Laserfiche Forms.



*Learn how to implement paperless travel requests with Laserfiche Forms.*

## THE USER INTERFACE

The employee initiates the travel request by logging into the electronic “Travel Request Form” in her browser.

A screenshot of a web-based "Travel Request" form. The form is titled "Travel Request" in an orange header bar. Below the header, there are several sections of input fields. The first section includes fields for "First Name" (highlighted in yellow), "Last Name", "Today's Date" (pre-filled with 10/22/2012), "Department" (a dropdown menu), and "Department Manager" (another dropdown menu). The second section, titled "Destination Information", contains fields for "Depart Date" and "Return Date" (both with calendar icons), and a "Destination(s)" field. The third section, titled "Daily Itinerary", has a "Date" field with a calendar icon and a "Daily Agenda" text area. At the bottom left, there is a blue "Add" link and a "Submit" button.

She fills out the required information, including “Name” and “Department.” Certain departments have conditional rules applied to them. If the employee selects “Sales,” for example, a “Reason for traveling” field appears. After filling in the requested information, the employee clicks “Submit” to submit the form.

### Travel Request

**First Name** \*

**Last Name** \*

**Today's Date**

**Department**

**Department Manager**

**Reason for travelling**

Workshop

Regional Training

User Group

Tradeshow

Client Site Visit

Other

---

#### Destination Information

**Depart Date** \* (?)

**Return Date** \* (?)

**Destination(s)** \*

---

#### Daily Itinerary

**Date**  ✖

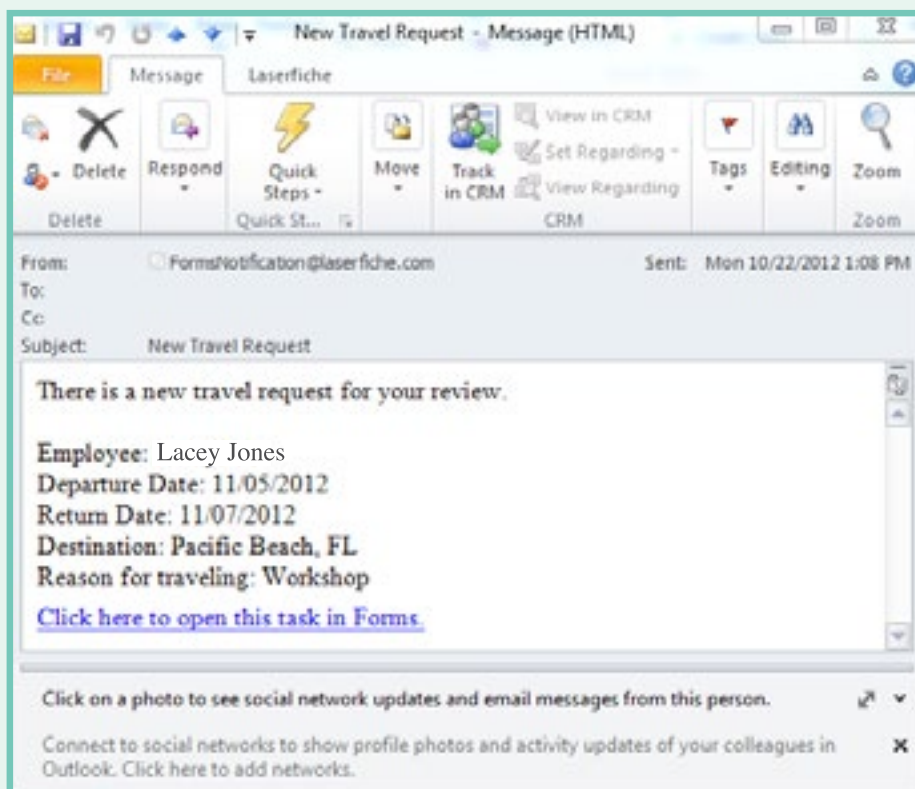
**Daily Agenda**

**Date**  ✖

**Daily Agenda**



After the employee submits the form, a PDF copy of the form is saved in the Laserfiche repository. The manager receives an email notification letting her know that the form is ready to review in Laserfiche Forms.



The email link opens a read-only version of the form. The manager approves or rejects the request by clicking “Approve” or “Reject.”

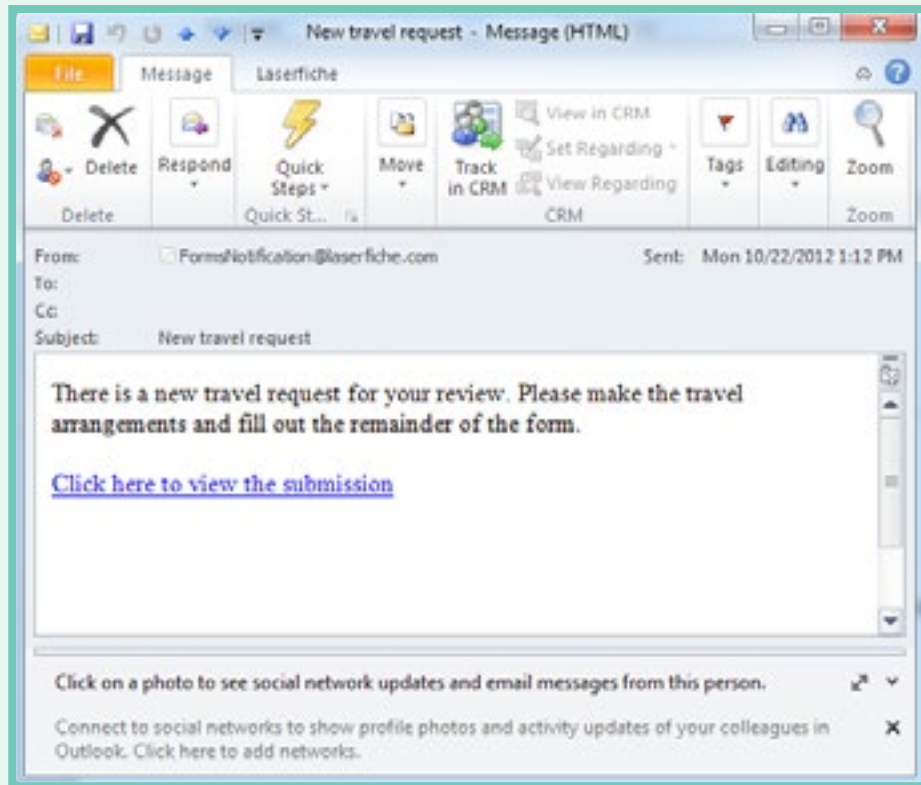
Daily Itinerary	
Date	Nov 5, 2012
Daily Agenda	Fly out.
Date	Nov 6, 2012
Daily Agenda	Attend workshop.
Date	Nov 7, 2012
Daily Agenda	Fly home.

**Approval Actions for Approve Travel Request**

Comments

The manager can also approve the travel request without opening Laserfiche Forms by replying to the email with either “Approve” or “Reject” in the body of the message.

If the request is approved, the travel coordinator receives an email notification that contains a link to the form.



Clicking the link takes the travel coordinator directly to a special, read-only version of the approved form that has an additional section for flight and hotel information. After making the travel arrangements, the travel coordinator fills in this section and submits the form.

### Flight/Hotel Details

Airline	<input type="text" value="Jet Air"/>
Flight Number	<input type="text" value="FF562"/>
Flight Confirmation Number	<input type="text" value="A99LB1"/>
Hotel Name	<input type="text" value="Sleepy Hollow"/>
Hotel Confirmation Number	<input type="text" value="7A02850W"/>
Additional information	<input type="text" value="Check out is at 10:00 am"/>

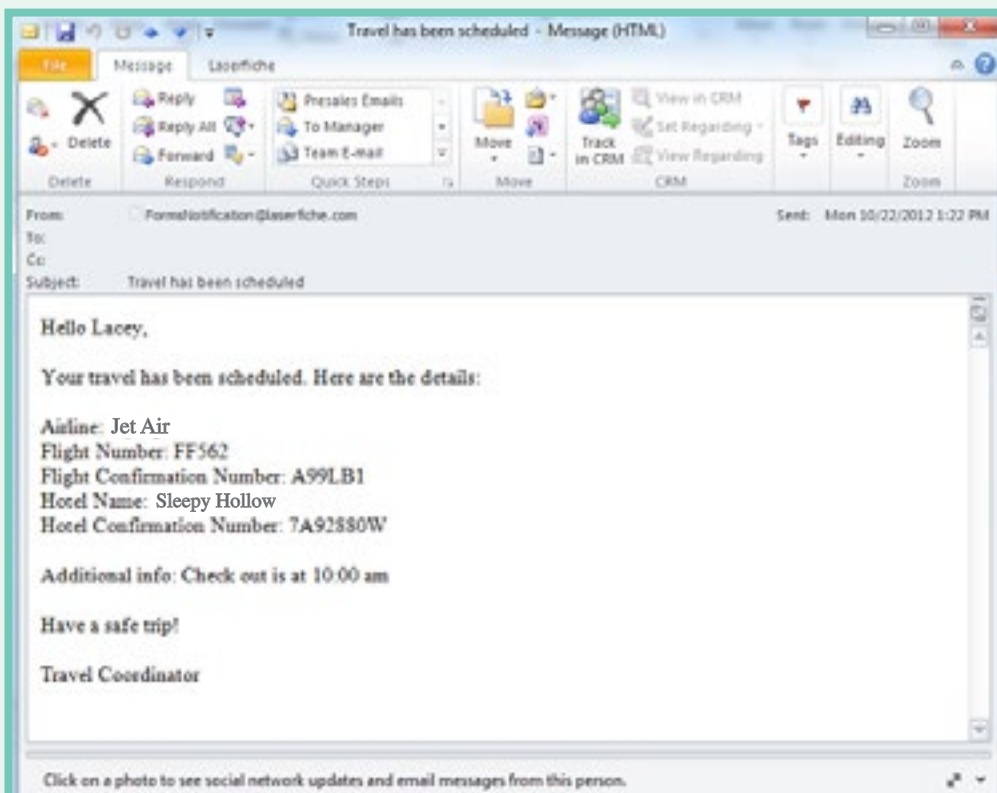
**Approval Actions for Schedule Travel**

Comments

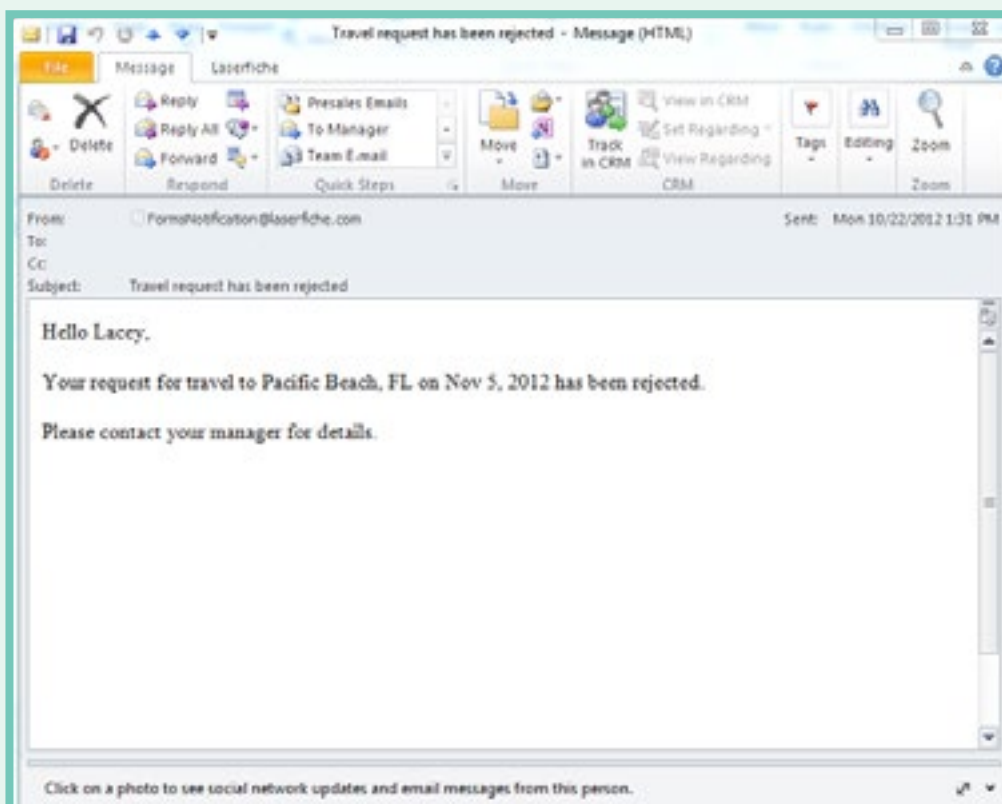




This generates an email to the employee with the flight and hotel information.



If the request has been rejected, an email is sent to the employee notifying her of the rejection and asking her to contact her manager for more details.



## WHAT IS HAPPENING BEHIND THE SCENES

The whole business process is mapped out in the Laserfiche Forms Process Modeler. Here is what the travel request process model looks like:



There are two types of tasks used in this process: user tasks and service tasks. User tasks, such as “Fill Out Travel Request” and “Schedule Travel” are tasks performed by people. Service tasks, such as “Email Travel Info” and “Save to Approved Folder” are tasks performed by services or web applications.

One aspect of configuring user tasks is creating the email notifications that are sent to the manager and travel coordinator to notify them of their tasks. Tokens can be used to customize the email notification by including information from the form. A link to the form is automatically appended to the end of the message. Here is how the notification for the “Approve Travel Request” user task is configured:

**User Task**

A task to submit, approve, or reject a form submission. [Learn More](#)

**Name**  
Approve Travel Request

General   Outflow   Priority   **Notifications**

Notify task participants when this task is ready

**Subject**  
New Travel Request

**Body**

HTML:    Plain Text:

There is a new travel request for your review.

Employee: {datasetFirst\_Name} {datasetLast\_Name}  
 Departure Date: {datasetDepart\_Date}  
 Return Date: {datasetReturn\_Date}  
 Destination: {datasetDestinations}  
 Reason for traveling: {datasetReason\_for\_traveling}



The manager can approve the travel request by email. The Email Approval Server must be specified on the Laserfiche Forms Configuration page in order to allow direct approvals. This option must be enabled individually for each user task by selecting the “Allow direct approval” checkbox in the user task configuration dialog box.

A screenshot of the 'User Task' configuration dialog box. The title is 'User Task'. Below the title is a blue banner with the text 'A task to submit, approve, or reject a form submission. [Learn More](#)'. The 'Name' field contains 'Approve Travel Request'. There are four tabs: 'General', 'Outflow', 'Priority', and 'Notifications', with 'General' selected. Under 'Task participants', a dropdown menu shows 'Department\_Manager'. The 'Form' section has a dropdown menu set to 'Travel Request Form', with '+ New Form' and 'Edit' buttons. Below this are three checked checkboxes: 'Make form read-only for task participants', 'Allow direct approval', and 'Action Buttons'. Under 'Action Buttons', there are three rows: 'Submit' (unchecked), 'Approve' (checked), and 'Reject' (checked), each with a corresponding button. At the bottom are 'Done' and 'Cancel' buttons.

If the application form was approved and travel scheduled, the form is sent to the Laserfiche repository for storage. Approved forms are stored in the “Approved Travel Requests” folder; rejected forms are sent to the “Rejected Travel Requests” folder.

It is easy to configure where the form will be saved in the Laserfiche repository using the Save to Repository service task. This task also allows the user to specify the template and fields that will be appended to the submission in Laserfiche. There are two different Save to Repository service tasks used in this travel request process: one to route approved travel requests and one to route rejected ones.

Here is how the task for routing approved travel requests is configured:

The screenshot shows the configuration for a 'Save to Repository' service task. The 'Type' is set to 'Save to Repository'. A blue banner indicates: 'Saves the specified form to a Laserfiche repository. [Learn More](#)'. The 'General' tab is active, with 'Outflow' also visible. The 'Repository profile' is set to 'Inhouse', with '+ New Profile' and 'Edit Profile' buttons. The 'Form' is 'Travel Request Form - Schedule Travel'. The 'Document name' is '{/dataset/\_form\_name} {/dataset/\_initiated\_time}'. The 'Path' is '\\{/dataset/Customer\_Name}/Approved Travel Requests'. The 'Volume' is '<Use parent folder's default volume>'. Under 'Save options', 'Save as PDF' is checked, while 'Include action history' and 'Save business process data as XML' are unchecked. There are 'Configure Fields' buttons for both 'Fields' and 'Parent folder fields'.



## **BENEFITS OF LASERFICHE FORMS**

With Laserfiche Forms, your organization can:

- ▶ Implement completely paperless business processes from start to finish.
- ▶ Efficiently capture input from multiple people on the same form, resulting in a much faster approval process.
- ▶ Make capture an integrated component of the business process, allowing the form to be auditable from the moment it is created.

# TRAVEL REQUESTS: SANITATION DISTRICT #1

**Industry:** State and Local Government

**Number of Employees:** 201 - 500

**Headquarters:** Fort Wright, KY

The travel request process at Sanitation District #1 (SD1), the second largest public sewer utility in Kentucky, used to be paper-heavy and cumbersome. SD1 automated this process with Laserfiche Forms and Laserfiche Workflow, making it completely paperless from start to finish.



*Kathy Jenisch, Records Manager, describes Sanitation District #1's paperless travel request process.*

## TRAVEL REQUEST

To request approval for business travel, an SD1 employee submits a travel request in Laserfiche Forms.

### Travel Request Form

---

#### Travel Information

Employee Last Name

Employee First Name

E-mail Address of Traveler

Departure Date

Return Date

Employee ID Number

Purpose of Travel

Any comments or notes regarding travel you would like to provide

Will you require assistance in making travel arrangements?  Yes  No  
(If yes is selected, your dept. admin. will follow up with an information form.)

Are you traveling with a group of SD1 employees?  Yes  No  
(If yes, please coordinate with all travelers with dept. admin.)

Is this travel anticipated in Travel Budget?  Yes  No

Once the form is submitted, it is saved in the Laserfiche repository. Laserfiche Workflow monitors the folder and sends an email to the employee's immediate supervisor that there is a new travel request for approval. The supervisor can either approve or decline the request by updating the value of the "Immediate Supervisor" field accordingly.

The screenshot shows a web-based form titled "Travel Request". At the top, there is a "Template:" dropdown menu currently set to "Travel Request". Below this, the form contains several input fields and dropdown menus, each with a right-pointing arrow button next to it:

- Last Name
- First Name
- Employee ID
- Travel Doc Type
- Immediate Supervisor
- Budget Center Head
- Fiscal Year
- Cash Advance
- Reimbursement
- Request Complete
- Check Number
- Cash Advance Ready
- Reimbursement Ready
- Travel Information
- Request for Payment

If the request is declined, the submitter is notified by email and the workflow ends. If the request is approved, an email is sent to the budget center head notifying him/her of a new travel request for approval.

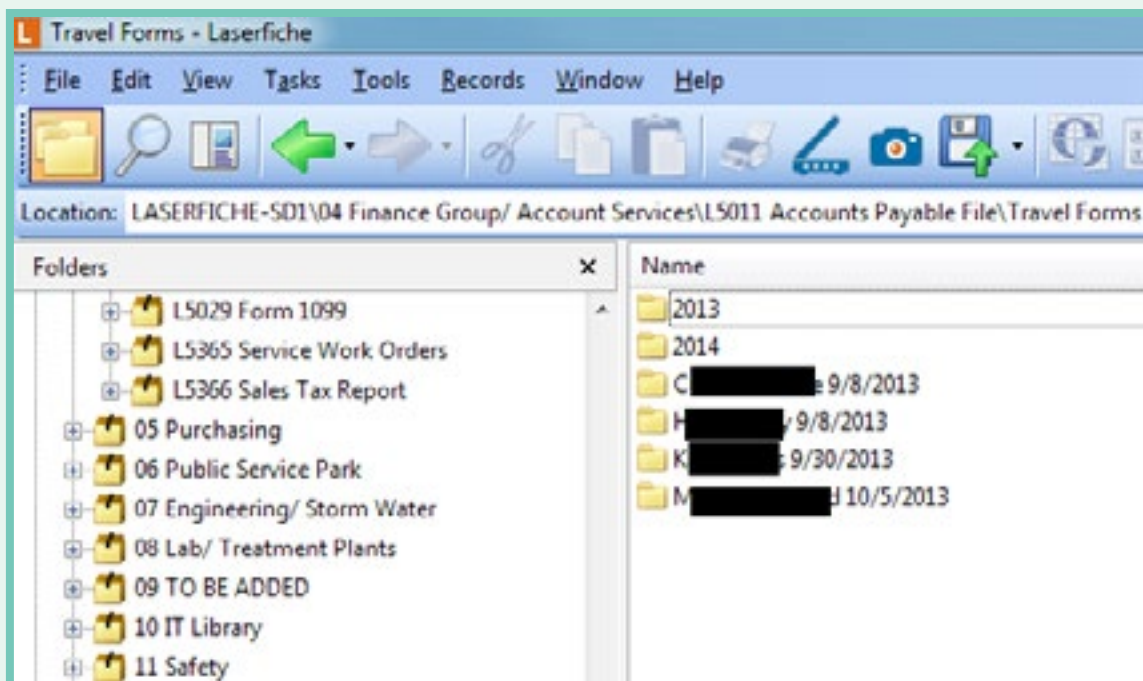
The budget center head can either approve or decline the travel request. If the request is declined, an email notification is sent to the submitter and the workflow ends. If the budget center head approves the request, an email notification is sent to the administrative assistant identified on the form for review.



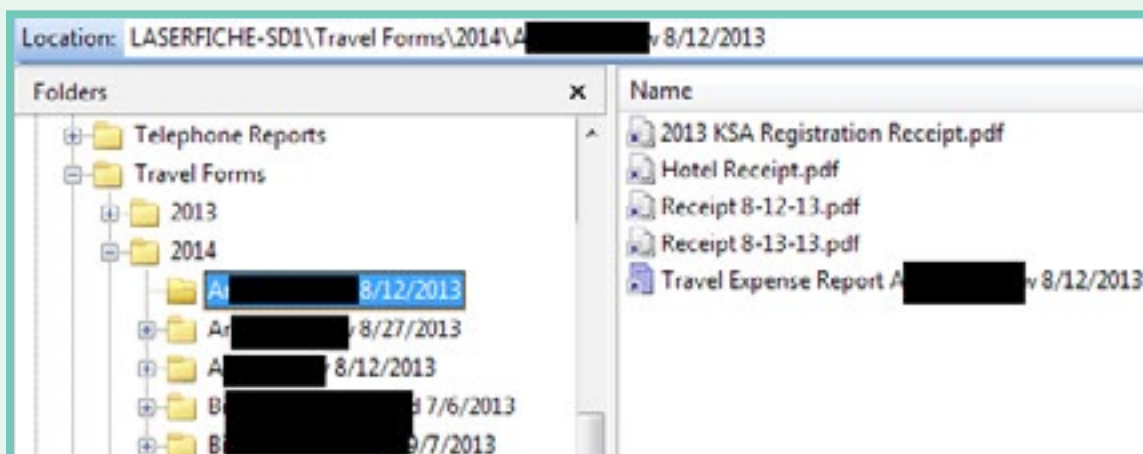


The administrative assistant attaches proper documentation, such as conference, meeting or hotel information, and enters the correct fiscal year into the template. Once the travel request is complete, an email is sent to the submitter advising that travel arrangements can be made.

The travel request form and associated documentation is moved to the records folder, where retention is automatically applied.



Shortcuts to the form and documents are created in the “Travel Forms” folder and the folder is named with the traveler’s name and date of travel so there is a separate “trip” folder for each travel instance.



## CASH ADVANCE

If an employee needs a cash advance for travel purposes, the Travel Advance Request form must be submitted after the travel request has been approved.

### Travel Advance Request

(To request a cash advance for approved local or non-local business travel)

Employee Last Name *	<input type="text" value="Smith"/>
Employee First Name *	<input type="text" value="Sarah"/>
Employee ID Number *	<input type="text" value="12345"/>
E-mail Address of Traveler *	<input type="text" value="sarah.smith@gmail.com"/>
Reason for Travel *	<input style="height: 40px;" type="text" value="Conference"/>
Destination	<input type="text" value="Miami, FL"/>
Departure Date *	<input type="text" value="10/1/2013"/>
Return Date	<input type="text" value="10/4/2013"/>
Advance Amount Requested *	<input checked="" type="radio"/> \$25 or more <input type="radio"/> Less than \$25 <small>(Select One)</small>
Total Advance Requested	<input type="text" value="100"/>

Laserfiche Workflow picks up the form and routes it through the various parties for approval, similar to the travel request process outlined above.

If the cash advance is for \$25 or more, the accounts payable department is notified to cut a check. If the cash advance is less than \$25, the accounts receivable department distributes the cash.

The form and its attachments are then routed to the same records series as the travel request form with retention automatically applied. A shortcut is also placed in the "Travel Forms" folder in the same trip folder with the travel request.



## TRAVEL EXPENSE REPORT

When the employee returns from the business trip, a travel expense form must be submitted through Laserfiche Forms. The form is set up in such a way that, when the employee enters daily expenses, subtotals and totals are automatically calculated.

<u>General Expenses</u>								
	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Total
Dates of Travel	10/1/2013	10/2/2013	10/3/2013	10/4/2013				
Airfare	500	0	0	0				500.00
Baggage Fees	30	0	0	0				30.00
Business Meal	0	50	65	0				115.00
Registration Fees	455	0	0	0				455.00
Rental Car	0	0	0	0				
Gas for Rental Car	0	0	0	0				
Ground Transportation	30	0	0	30				60.00
Lodging/Hotel	395	0	0	0				395.00
Parking Fees/Tolls	0	0	0	0				
Mileage (Personal Vehicle)	25	0	0	25				28.25
Phone,Fax,Internet,Postage	0	0	0	0				
Other:								
Other:								
Other:								
(Less personal expenses)								
<b>Total General Expenses</b>							<b>1583.25</b>	

Pre-paid expenses are also automatically subtracted to calculate the actual reimbursement due to the employee.

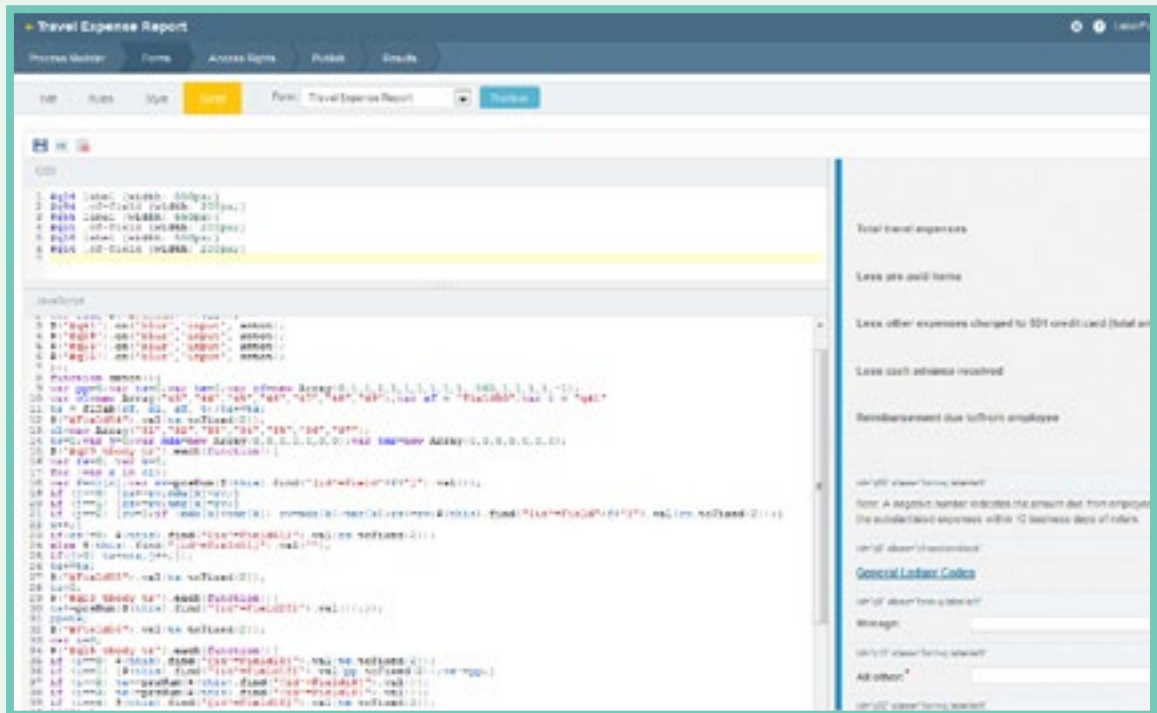
<u>Pre-Paid Expenses</u>				
	Date	Vendor	Check No/Auth Code	Amount
Airfare	9/12/2013	Expedia	1050	500
Registration Fees	9/1/2013	Conference	1040	455
Lodging	9/12/2013	Marriott	1051	395
Ground Transportation				
<b>Total Pre-Paid Expenses</b>				<b>1350.00</b>

<u>Expense Summary</u>	
	Amount
Total travel expenses	1738.25
Less pre-paid items	1350.00
Less other expenses charged to SD1 credit card (total amount)	
Less cash advance received	
<b>Reimbursement due to/from employee</b>	<b>388.25</b>

Note: A negative number indicates the amount due from employee. The employee must return to SD1 any amount in excess of the substantiated expenses within 10 business days of return.

This is done using JavaScript in the Script section of the Laserfiche Forms Designer.



Once the employee submits the form, Laserfiche Workflow routes it to the appropriate individuals for review, just like the travel request and travel advance request processes outlined above.

After the report is approved by the budget center head, it is sent to either the accounts payable department (if the reimbursement is \$25 or more) or the accounts receivable department (if the reimbursement is less than \$25 or if the employee owes SD1 money).

After the respective department processes the payments, the submitter is notified (via email) to pick up the check or cash or to submit a payment for the outstanding amount.

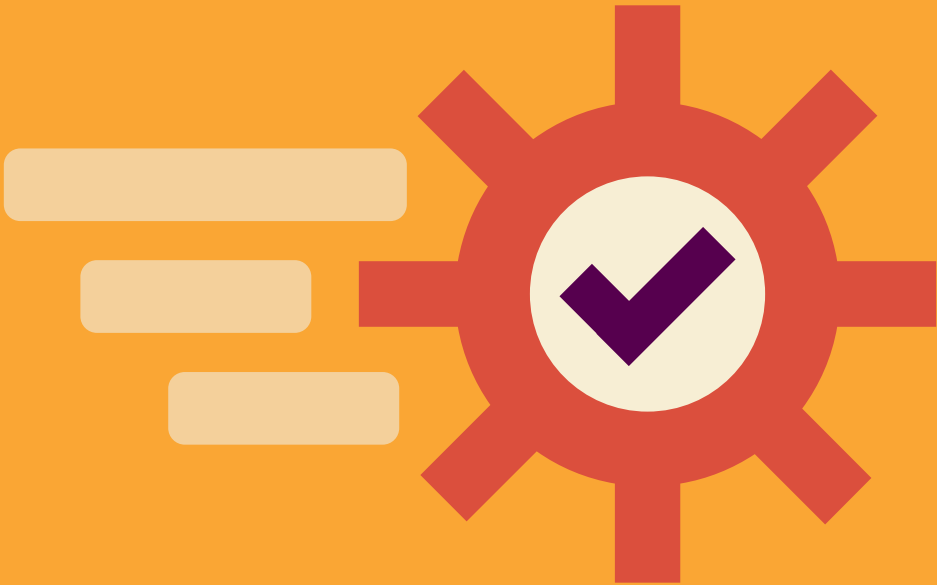
The travel expense report and its attachments are then routed to the same records series as the travel request form and travel cash advance request form with retention automatically applied. A shortcut is also placed in the same trip folder inside the "Travel Forms" folder.



## **BENEFITS OF LASERFICHE**

Implementing the new automated travel request and expense reimbursement process with Laserfiche has resulted in the following benefits for SD1:

- ▶ Documents are never lost or misfiled and requests are approved in a timely manner.
- ▶ The records manager is confident that all documents have the correct retention applied while employees can still view their requests in a folder structure that is familiar to them.
- ▶ No paper is printed or filed.
- ▶ The new process is faster and more efficient than the legacy paper process. Employees get reimbursed much quicker than before.



# TRANSACTIONAL PROCESSES

Whether it is processing loans at a bank or petitions at a university, most organizations must do transactional processing. Laserfiche Forms simplifies transactional processes by streamlining the entire review and approval process. Applications will always be complete and legible and never lost.

This section contains solutions for making processes such as customer onboarding, loan processing and purchase requisitions completely paperless.

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# LOAN PROCESSING: T BANK

**Industry:** Financial Services

**Number of Employees:** 11 – 50

**Headquarters:** Dallas, TX

T Bank primarily serves small businesses such as dentists, attorneys and accountants. As such, it offers Small Business Administration (SBA) loans, which are given to individuals planning to start or expand a business. The SBA lending process includes a large number of documents that need to be submitted, reviewed and approved by various parties. Here is how Laserfiche Forms and Laserfiche Workflow have simplified this process.





*Thad Hutcheson, Chief Technology Officer, describes T Bank's innovative Laserfiche Forms implementation.*

## LASERFICHE FORMS

Since T Bank only has one branch (in Dallas, TX), but customers all over the United States, the majority of business is done remotely. Customers who are applying for SBA loans must submit most of their supplemental documentation online.

Since many of those documents are large and contain sensitive content, emailing them was not an option. T Bank decided to use Laserfiche Forms instead.

After applying for an SBA loan, the customer fills out the SBA Document Submission form that is embedded in the T Bank client portal. Certain information, such as submitter name and email, is populated automatically from the database. As part of filling out the form, the customer uploads relevant documents such as a tax return.

The screenshot shows a web form titled "SBA Document Submission" with a dark red header. The form contains the following fields and sections:

- Submission Date:** A text input field containing "10/18/2013" with a calendar icon to its right.
- Submit To:** A dropdown menu.
- Submit To E-mail:** A text input field.
- Submitted By:** A text input field.
- Submitted by E-mail:** A text input field.
- Notes:** A section with the heading "Notes" and a sub-heading "Please tell us anything you feel is pertinent to this submission". Below this is a large, empty text area.
- File Upload:** A section with the heading "File Upload" and the instruction "Browse to the files you wish to submit." Below this is a text input field followed by a "Browse" button. Underneath the input field is the text "Or drag files here".
- Submit:** A dark blue button with the text "Submit" in white, located at the bottom left of the form.

## LASERFICHE WORKFLOW

Once the form is submitted, it is saved in the Laserfiche repository, and Laserfiche Workflow takes over. This workflow:

- ▶ Uses the Retrieve Laserfiche Forms Content activity to extract the information entered into the form.



- ▶ Finds all the documents submitted with the form, assigns the Loans template to each of them and populates the templates with the appropriate metadata.
- ▶ Moves the documents to an SBA Operations Inbox folder and renames them according to a standardized naming convention: SBA Submission Entry Name Submitter Name Date Submitted.



- Creates Laserfiche Web Access URLs to the document and folder. These URLs are included in the email notification to the person responsible for processing the SBA loan.

**Generate Web Access URLs**

**Activity Name**  
Generate Web Access URLs

**Activity Description**  
Generates URLs for opening folders and/or documents in Web Access. The URLs are made available as tokens that you can use in other activities in your workflow definition.

**Entry URLs** [Hide Details](#)

**Folder Link** ✖

Entry: (Move Each Entry 2 SBA Operations INBOX::ParentFolder)

Starting URL: https://dms.tbank.com/laserfi...

Action: View entry (if entry is an electronic document, use Web Access settings)

**EntryLink** ✖

Entry: (Move Each Entry 2 SBA Operations INBOX::OutputEntry)

Starting URL: https://dms.tbank.com/laserfi...

Action: View entry (if entry is an electronic document, use Web Access settings)

**Search URLs**

SBA Submission - Message

To: %/RetrieveLaserficheFormContent\_Submit\_to\_Email\_address)

CC:

BCC:

Subject: SBA Submission

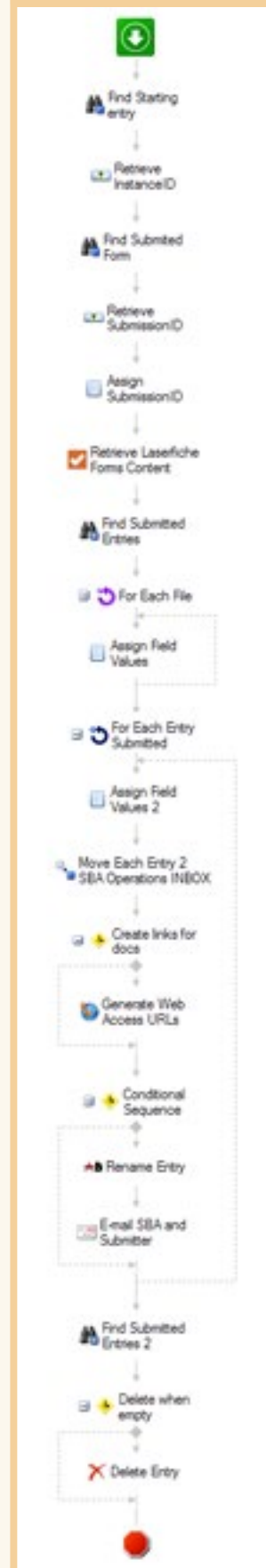
Attach: Starting Entry

Document(s) have been successfully submitted to SBA Loans on %/DateTime).

Web Access Folder Link = %/GenerateWebAccessURLs\_Folder Link)

Web Access entry Link = %/GenerateWebAccessURLs\_EntryLink)

Here is what the whole workflow looks like:





## **BENEFITS OF LASERFICHE**

Implementing Laserfiche at T Bank has resulted in the following advantages:

- ▶ T Bank can now provide loans faster than its competitors, which is exactly what customers want.
- ▶ All documents submitted to T Bank are now secure from the moment they are uploaded through Laserfiche Forms.
- ▶ Using Laserfiche Forms for the SBA loan document submission results in a better and easier customer experience.

# NEW CUSTOMER ONBOARDING

**Job Functions:** Insurance Adjusters, Underwriters, Department Managers

**Business Process:** Onboarding New Customers

For insurance companies, onboarding new customers is a paper-heavy process: a great deal of paperwork must be filled out and reviewed by multiple parties, and sometimes underwriting is necessary for the customer to be approved. Here is how one health insurance company streamlined this process with Laserfiche Forms.



*Insurance companies: Learn how to create a fully automated customer onboarding business process with Laserfiche Forms.*

## THE PROCESS

The process starts when a prospective customer fills out the main application form on the company's website. Certain fields are marked as required so that the form cannot be submitted if they are left blank.

**Health Insurance Application Form**

Are you existing member?  
 NO  YES

Company / Association

Date Employed / Join Date

**Section 1. Details of main member** ⌵  
(For existing member, please confirm or update your details)

Title\*

Last Name\*

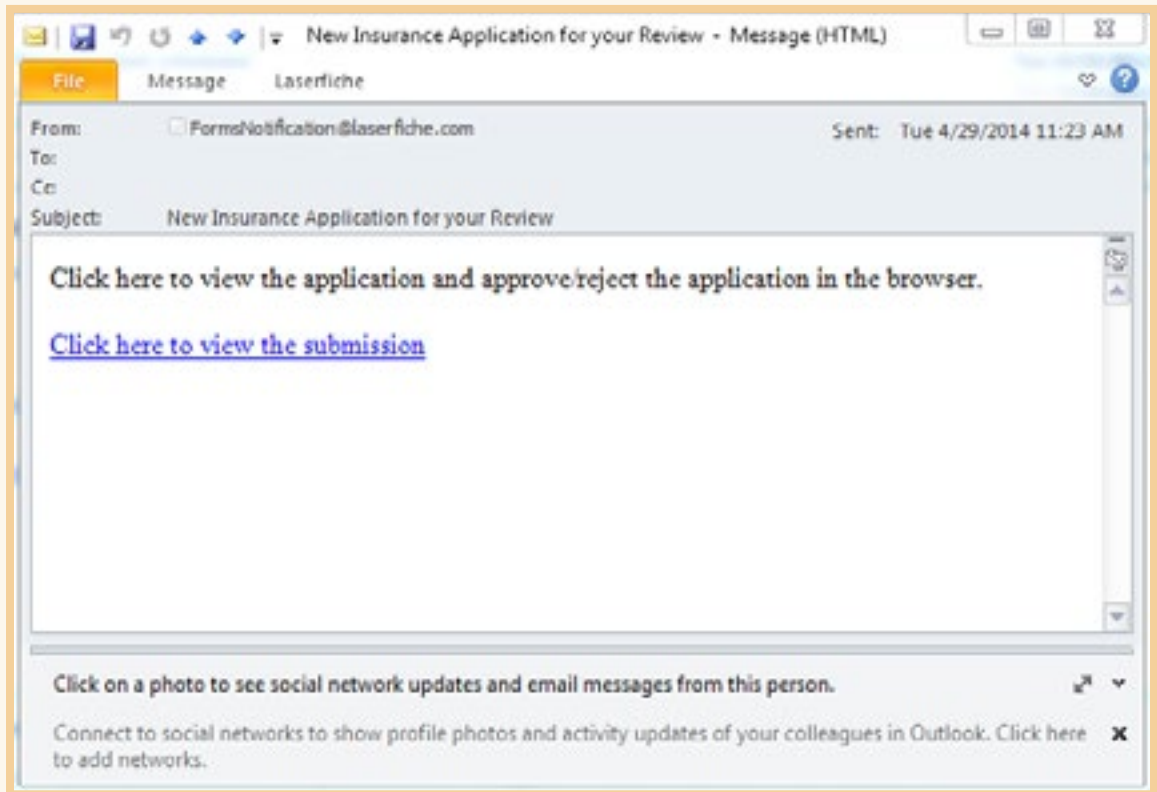
First Name(s)\*

Known Name

Date of Birth\*

Gender\*  
 Male  Female

Once the prospect fills out the form and clicks “Submit,” the form is routed to the insurance adjuster. The adjuster is notified by email that he has a new form to review. He can click the link in the email to access the submission within Laserfiche Forms.



The insurance adjuster reviews the form to make sure it is a valid application and either approves or rejects it. If the application requires underwriting, he selects the appropriate radio button.

A screenshot of a web application interface for reviewing insurance applications. At the top, it says "Internal Only". Below that is a yellow highlighted section titled "Require Underwriting" with two radio buttons: "Yes" (which is selected) and "No". Underneath is a yellow header bar that says "Actions for Review Application". Below this header is a "Comments" section with a large empty text input box. At the bottom of the interface are two buttons: "Approve" and "Reject".





If the form does not require underwriting, the health insurance policy is automatically issued. Otherwise, the application is routed to the underwriter who must fill out an underwriting form. Some of the fields on the form are pre-populated from the insurance application.

### Underwriting Form

Membership ID	<input type="text"/>
Employer	<input type="text" value="Laserfiche"/>
Phone Number	<input type="text" value="5628004567"/>
Email Address	<input type="text" value="janesmith@yahoo.com"/>
Residential Address	<input type="text" value="3200 Aquarium Way"/>
	Street Address
	<input type="text"/>
	Address Line 2
<input type="text" value="Anycity"/>	<input type="text" value="CA"/>
City	State / Province / Region
<input type="text" value="90500"/>	<input type="text" value="USA"/>
Postal / Zip Code	Country

### Lives on Policy

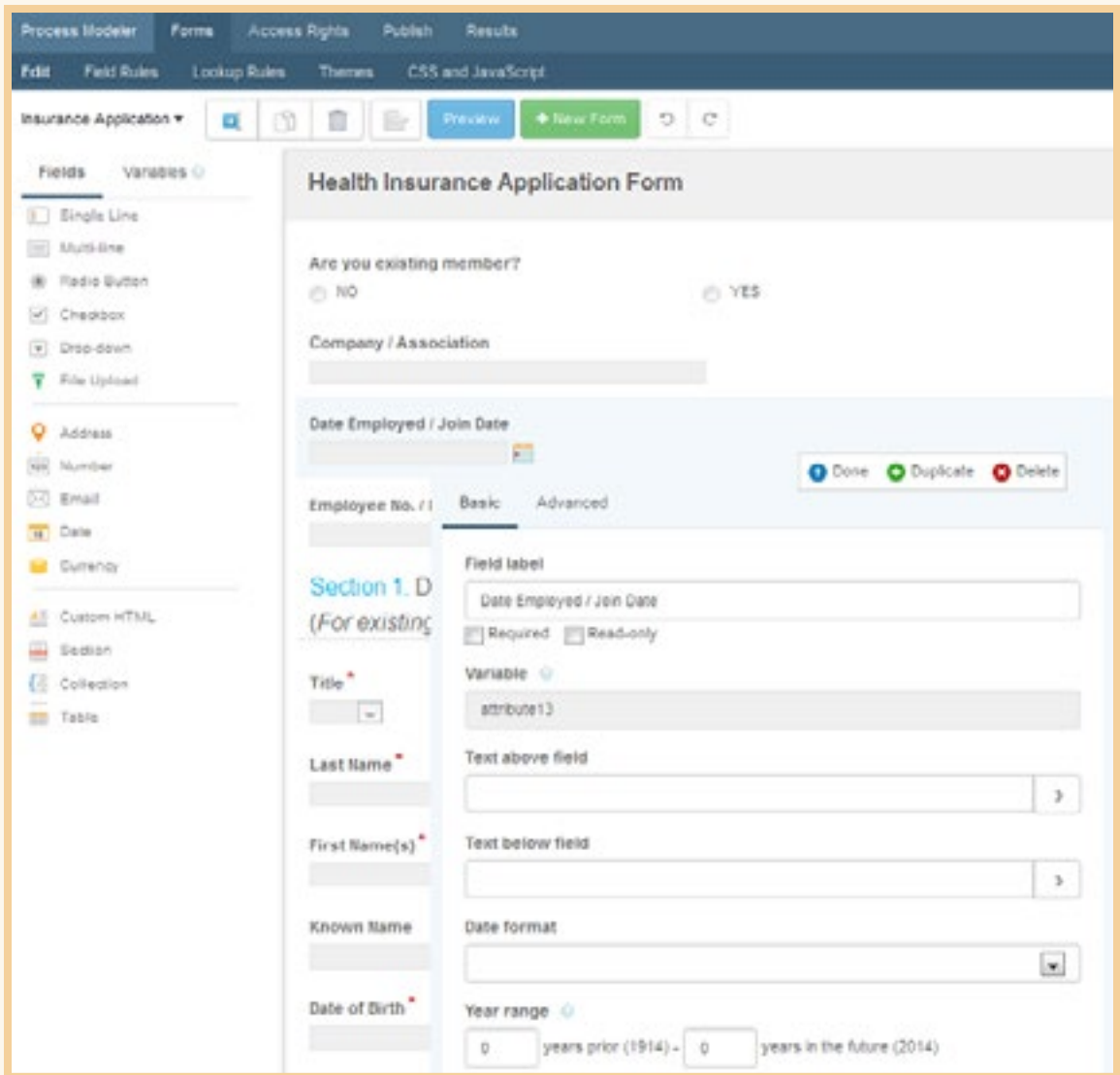
First Name	<input type="text" value="Smith"/>
Last Name	<input type="text" value="Jane"/>
Status	<input type="text" value=""/>
Relationship	<input type="text"/>
DOB	<input type="text" value="10/17/1988"/>

After the underwriting form is submitted, it is routed to the manager for final review. If the manager approves the form, he must also review the original application. Once that is approved, the policy is issued. The application is then routed to a folder in the Laserfiche repository for storage.

If the underwriting form or application is rejected, the process ends.

## WHAT IS GOING ON BEHIND THE SCENES

The two forms are created in the Form Designer.





Some of the fields in the form are dynamic. For example, if someone checks “Yes” in response to “Are you an existing member?” then the “Employee No. / Membership No.” field appears. If someone selects “No,” this field does not appear. These fields are configured on the Field Rules page.

The entire business process is designed in the Laserfiche Forms Process Modeler.



This process starts when an applicant fills out the form on the company's website. The form is embedded on the site using the code found on the Publish page.

Process Modeler   Forms   Access Rights   Publish   Results

Status  
Published on 4/30/2014 12:22:10 pm by Lena Chen

[Hide Process](#)

Save to Laserfiche

Save a copy of each submitted form to the repository

Share  
Use the URL shown below to share this process with others.

<https://secure1.laserfiche.com/Forms/82> [Edit](#)

[Email](#)

Use the code below to embed the form into an existing Web page.

```
<script type="text/javascript" src="https://secure1.laserfiche.com/Forms/js/forms-embed.js?v=9.1"></script><script type="text/javascript">fembed = new LaserficheForms.Form({url:element to place form in?/bpid: 82, host:'https://secure1.laserfiche.com/Forms'}) getForm();</script>
```

Once submitted, the form moves through the various user tasks, each one representing an action performed by the adjuster, underwriter or manager. When it is approved, the form is saved to the Laserfiche repository with the Save to Repository service task. This task also allows the user to specify the template and fields that will be appended to the submission in Laserfiche.

Save to Repository

Name

Type

[Saves the specified form to a Laserfiche repository. Learn More](#)

General   Custom

Repository profile  
 [New Profile](#) [Edit Profile](#)

Form

Document name

Path  
 [3](#) [...](#)

Volume

Save options

Save as

Include action history

Save business process data as XML

Fields  
[Configure Fields](#)



## **BENEFITS OF LASERFICHE FORMS**

Some of the benefits provided by Laserfiche Forms include:

- ▶ The entire application process is paperless from start to finish, which means no lost or illegible applications.
- ▶ Dynamic fields in the form prevent applicants from getting overwhelmed with fields that may not pertain to them.
- ▶ Administrators can track each application throughout the process, allowing them to make sure that work is accomplished in a timely matter. If delays occur, administrators can quickly locate and address them.

# PATIENT FILE MANAGEMENT: KIDS CLINIC

**Industry:** Healthcare

**Number of Employees:** Less than 50

**Headquarters:** Whitby, Ontario, Canada

Kids Clinic offers comprehensive consultations, evaluations and treatment for children with developmental, behavioral and psychiatric problems from birth through adulthood. From referral to the final consultation letter, the typical patient care process spans months and involves a number of consultations and tests. Here is how Kids Clinic was able to automate the whole process with Laserfiche.



*Sarah Knibbs, Clinic Manager, describes how Laserfiche Forms and Laserfiche Workflow automated the whole patient care process from initial referral to final consultation letter.*

## PATIENT REFERRAL

Referrals to the clinic are received by fax. The clinic uses a virtual fax so that all incoming faxes are automatically stored on the server. The receptionist uploads the referrals from the server to the "To be scheduled" folder in Laserfiche. The scheduling manager creates the patient's record in the clinic's Jonoke EMR system and schedules the patient's first appointment. When she is finished, she updates the status of the referral to "Pending Confirmation" and populates the Jonoke ID field. After the patient confirms the appointment, the scheduling manager updates the status to "Pending Initial Appointment."

Patient information is exported from Jonoke on a regular basis and stored in a network folder. From there, it is uploaded into a SQL database at regular intervals. A Laserfiche workflow performs a lookup into this SQL database based on the Jonoke ID to populate the remaining metadata fields.

## INITIAL VISIT

During the patient's initial visit the receptionist ensures that the policies and procedures form is signed (once per patient) and marks it as signed in Laserfiche. She then assigns the patient file to a psychologist by changing the value of the Assignee field.

Template: General

Jonoke ID (required)  
[Redacted]

First Name  
[Redacted]

Last Name  
[Redacted]

GPO  
1: [Redacted]

DOB  
7/29/2005

Status  
03. Pending confirmation

Policies and Procedures signed  
No

Notes

Assignee  
Skhattak

History  
Scribbs changed the status to 03. Pending confirmation at 9/9/2013 1:40:00 PM

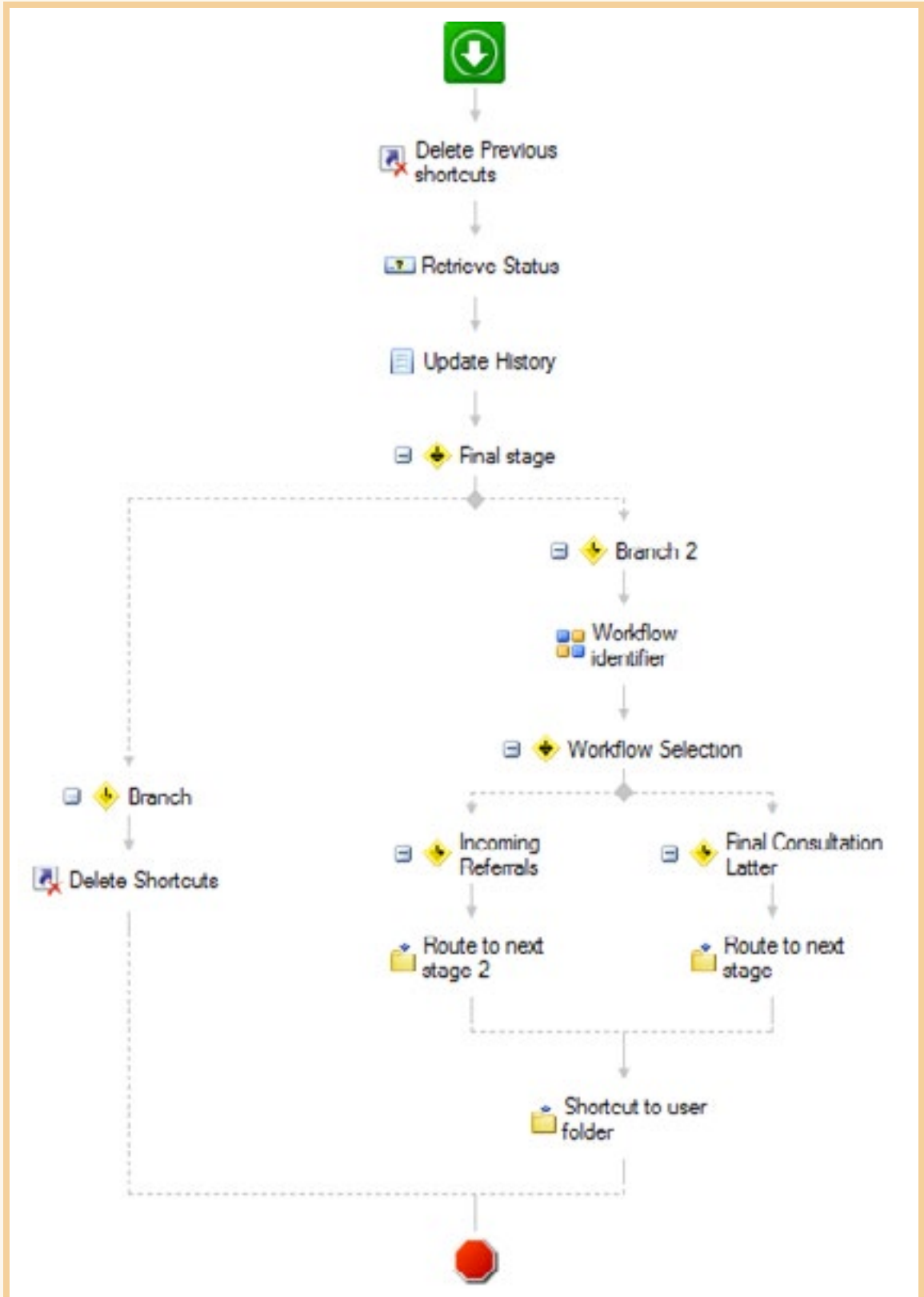
Outgoing referral  
No

Tests/consultation ordered  
No

Add/Remove Fields...

Outgoing Referral Status / Results Status  
00. Not Started

Laserfiche Workflow creates a shortcut to the patient's file in the psychometrist's personal folder in Laserfiche. Here is what this workflow looks like:







The psychometrist fills out the intake questionnaire in Laserfiche Forms. When the Jonoke ID is provided, a number of fields are pre-filled.

### Intake Interview

**Jonoke ID \***

**Last Name**

**First Name**

**DOB \***

**Current Age**

**Patient Came With:**

**Lives With:**

**Referring Doctor:**

**Reason for referral:**

**Main Concerns:**

#### School History

**School Name**

**Grade**

**Marks**

**IEP**  Yes  No

**Problems at School**

JavaScript is used to automatically calculate the patient's age based on the birth date entered.

```

JavaScript
1 //Age calculation - Begin
2 $(function() {
3   $(".cAge").on('change',function () {
4     var strBirthday = $("li[atr=dtDoB] input").val();
5     var RE = /\d{4}-\d{2}-\d{2}/g;
6     if (RE.test(strBirthday) == false)
7     {
8       alert("Date must be in the format YYYY-MM-DD");
9       return;
10    }
11    $("li[atr=tbAge] input").val(fnAge(strBirthday));
12  });
13
14  function fnAge(strDoB) {
15    var Today = new Date();
16    var re = /\d{4}-\d{2}-\d{2}/g;
17    var DoB = new Date(strDoB.replace(re,"$1"),strDoB.replace(re,"$2"),strDoB.replace
18    var Age = Today.getFullYear() - DoB.getFullYear();
19    return Age;
20  }
21  });
22 //Age calculation - End

```

Once the form is submitted, Laserfiche Workflow routes it to the patient's folder in Laserfiche. Here is what the workflow looks like:





After seeing the psychometrist, the patient is assigned to a doctor. The doctor is able to view the patient's records from his iPad with Laserfiche Mobile during the visit.

The doctor is also able to fill out a counseling form in Laserfiche Forms.

### Counseling Form

Jonoke ID *	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
DOB *	<input type="text"/>
Current Age	<input type="text"/>
Height / cms *	<input type="text"/>
Height / ft in	<input type="text"/>
Weight / kg *	<input type="text"/>
Weight / lbs	<input type="text"/>
BMI	<input type="text"/>
Is there any current medication? *	<input type="radio"/> Yes <input type="radio"/> No
How is the patient doing? *	<input type="radio"/> Well overall <input type="radio"/> Not well
Side Effects	<input type="radio"/> Yes <input type="radio"/> No
How is the patient doing in school?	<input type="text"/>

Much of the information is prepopulated from the database based on the Jonoke ID. Certain information, such as the patient's BMI, is automatically calculated with JavaScript based on the content of the height and weight fields.

```
62 //BMI calculation - Begin
63 function fnBMI(intHt,intWt){
64     if (isNaN(intHt) || isNaN(intWt) || (intWt==0))
65         return;
66     else
67     {
68         $("#li[attr=intBMI] input").val(((intWt*10000)/(intHt*intHt)));
69         return;
70     }
71 }
72 //BMI calculation - End
73
74 });
```

Once the form is submitted, Laserfiche Workflow picks it up and routes it to the patient's folder in Laserfiche.

At the end of the visit, the doctor may order tests, provide additional questionnaires or provide feedback. He updates the file's status accordingly. He also assigns the file to the next person responsible (such as another doctor, a psychometrist, etc.) using the Assignee field.

Laserfiche Workflow removes the existing shortcuts and creates new shortcuts in the assignee's home folder and in the folder corresponding to the next step in the workflow.



## SUBSEQUENT VISITS

The new assignee conducts the assigned tasks (performs and scores tests, sends letters for transcription, etc.) and updates the status and assignee fields when they are complete. The task assignments may be exchanged between the doctor and other clinical personnel multiple times and in an ad hoc fashion.

The workflow is designed to accommodate this exchange by not constraining the sequence of stages. Additionally, there is a history field that tracks each stage that the patient file passes through, along with the name of the user who changed the status and the date/time of the change.

Metadata - 17442

Fields Tags Links

Assignee

History

- ADMIN changed the status to 00. Not started at 10/16/2013 2:39:34 PM
- Skriggs changed the status to 01. To be scheduled at 10/16/2013 2:39:34 PM
- Skriggs changed the status to 02. To be faxed at 10/16/2013 4:22:34 PM
- Skriggs changed the status to 03. Pending confirmation at 10/17/2013 11:15:07 AM

Outgoing referral

No

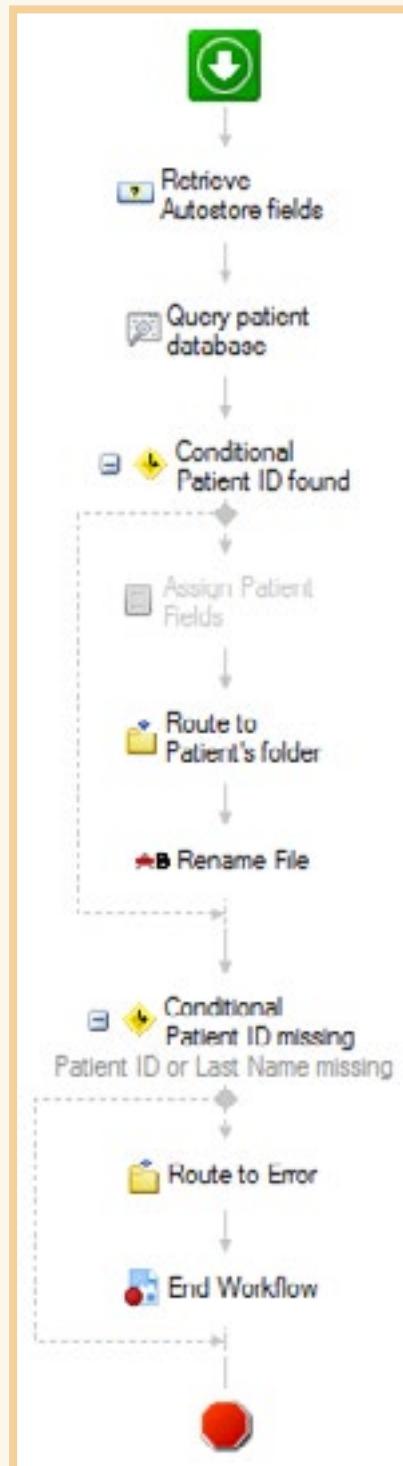
OK Cancel Help

After the final visit, the assignee completes and mails out a final treatment report. He then updates the status to "Complete and Sent" and all shortcuts are cleaned up. It can take six weeks or more between the initial visit and the date that the final treatment report is finished.

## NEW PAPERWORK

Whenever new patient paperwork is scanned into Laserfiche, the scanner operator populates the Jonoke ID field. Laserfiche Workflow does a lookup into the patient database to populate the remaining metadata.

The new document is then routed into the patient's folder. If the Patient ID is missing, the document is routed to an Error folder and the workflow terminates. Here is what this workflow looks like:





## **BENEFITS OF LASERFICHE**

Implementing Laserfiche has resulted in the following benefits for Kids Clinic:

- ▶ Doctors, psychometrists and other clinical personnel see all patients assigned to them at a glance in their Laserfiche folders.
- ▶ Administration can view all of the patients at a given stage in the workflow to identify bottlenecks and see how the clinic is performing against its benchmarks.
- ▶ Wait times for services have been reduced because employees have more time to focus on the patients.
- ▶ Data entry errors and effort have been reduced with the implementation of Laserfiche Forms. Many form fields are pre-populated with patient data and calculations (e.g. BMI from height and weight) are performed automatically.

# PURCHASE ORDERS

**Job Functions:** Accounting Managers, Department Managers  
**Business Process:** Purchase Order Processing

Every organization must deal with purchase orders (POs) in some capacity. Here is how to make the purchase order process completely paperless with Laserfiche Forms.





*Learn how to use Laserfiche Forms to make your organization's purchase orders completely paperless.*

## **THE SCENARIO**

The marketing department at LaserWorks outsources printing of product brochures to an outside vendor. A tradeshow is coming up and the company wants to hand out three brochures about its most popular products at the show.

The previous process involved an event assistant filling out a purchase order form by hand, and then delivering it to the marketing events manager who reviewed and signed it. This paper PO would then wend its way through the marketing and accounting departments before finally being completed, approved and filed.

We've streamlined this time-consuming and inefficient process with Laserfiche Forms.

## THE NEW PROCESS

The events assistant accesses the PO form from the LaserWorks intranet. Here is what the full form looks like:

LaserWorks
PURCHASE ORDER

---

**Bill To**  
LaserWorks  
1000 Laser Way  
Long Beach CA 90807

**Ship To**  
Same as Bill To address

---

**Requestor Information**

Requester\*

Date

Select Manager to approve\*

Choose your Department\*

---

**Vendor Information**

Vendor\*

Address

Telephone

Contact

Payment Terms\*

Payment Terms\*

---

**Item Description**

Fill out the item(s) you want to purchase. Click on "Add Item" if you have more than one item.

Product Description*	Quantity	Unit Price	Total Price*	Department	Category
<input type="text"/>	<input type="text"/>	\$ <input type="text"/>	\$ <input type="text"/>	<input type="text"/>	<input type="text"/>

[Add Item](#)

**Notes** Specify reason or add relevant information about the item(s)

**Special Instructions**

**Tax** \$

**Shipping and Handling** \$

**Total** The total includes the total price, tax, and shipping  
\$

---

**Attach Supporting Documentation**

Attach relevant information for reference. Examples: Screenshots of computer hardware, catering price lists, etc. You can upload multiple files.

**Upload**

Or drag files here

Save unfinished form to complete later



The events assistant fills out the PO with the required information. As she inserts quantities and unit prices of the brochures, the "Total Price" field is automatically filled out with the correct subtotal. When she adds in the sales tax and shipping/handling charges, the "Total" is automatically calculated.

**Item Description**

Fill out the item(s) you want to purchase. Click on "Add item" if you have more than one item.

Product Description*	Quantity	Unit Price	Total Price*	Department	Category
1 LaserWorks Super Laser Brochure	100	\$ 1.25	\$ 125	Marketing	Tradeshop
2 LaserWorks Laser City Software Brochure	100	\$ 0.89	\$ 89	Marketing	Tradeshop
3 LaserWorks Laserphonics Brochure	100	\$ 2.03	\$ 203	Marketing	Tradeshop

[Add item](#)

**Notes** Specify reason or add relevant information about the item(s).

**Special Instructions**

**Tax** \$ 35

**Shipping and Handling** \$ 25.99

**Total** The total includes the total price, tax, and shipping.  
\$ 477.99

Once the form is completely filled out, the events assistant clicks “Submit” and the form is routed to the events manager for approval. The events manager must look over the form and sign it. She can also designate another manager to approve and sign the form. In this case, Mindy Manager has designated Michael Marks.

**Manager Section**

Type in your name and date. Select yes if the process needs another approver to review

**Signature\*** Please type your full name here as your signature  
Mindy Manager

**Date\*** 11/8/2012

**Does the purchase order need another manager to approve?\***  Yes  No

**Select Manager to Approve\*** Michael Marks

Submit

The form is routed to Michael for his review. After this review step, the PO is sent to the accounting manager.

**Manager Section**

**Final Approver**

**Final Approval Date**

Submit



Once the accounting manager approves the PO, it is automatically sent to the accounting clerk who generates a PO number and fills in the appropriate field on the form.

# LaserWorks

## PURCHASE ORDER

<b>Bill To</b> LaserWorks 1000 Laser Way Long Beach CA 90807	<b>Ship To</b> <input type="text" value="Same as Bill To address"/>
---	--

Please assign the PO number

PO#

If the invoice has already been uploaded, the events assistant receives an email with the PO number. If she has not yet uploaded the invoice, she automatically receives the form below.

### Attach Invoice

Attach the invoice here. If the total amount on the invoice is different from the approved amount on the PO, please explain why.  
Sample explanations: Online vendor changed prices, shipping costs changed, additional people signed up for a workshop.

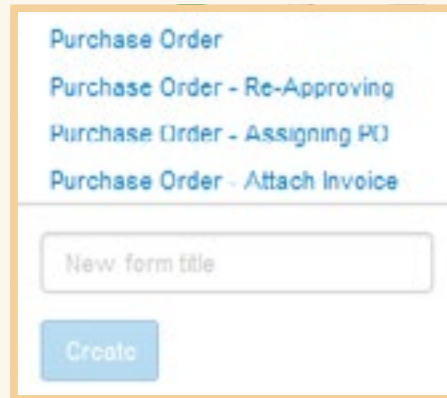
Upload Invoice    
Or drag files here

Specify reason(s) if price is different from the origin price

The form and attachments are then routed to the accounting manager for final review. Once the review is complete, the accounting clerk mails payment to the vendor and the form and its attachments are sent to a specific folder in the Laserfiche repository for final storage.

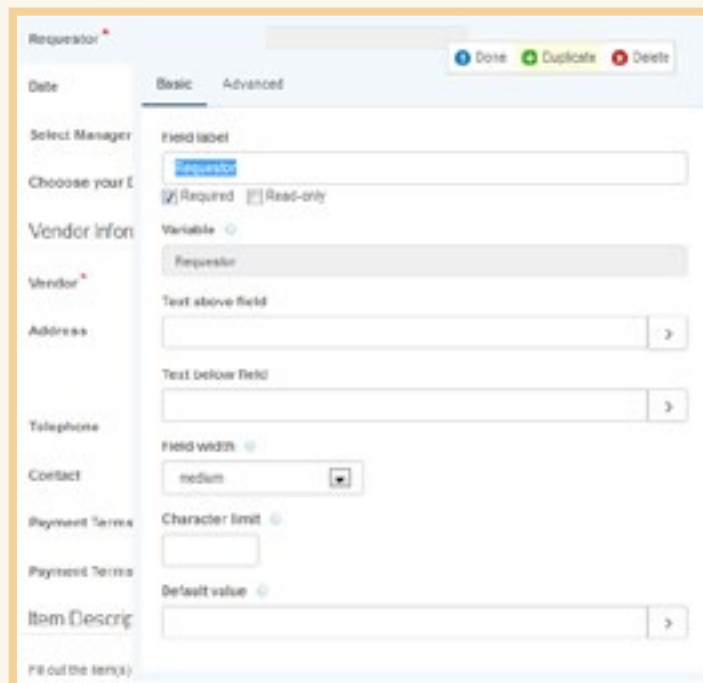
## WHAT GOES ON BEHIND THE SCENES

Although the final document is a single PO, the process actually contains four different forms.



Information from the first form (the original PO form that the events assistant filled out) is copied to each of the other forms, with additional fields for each review step. For example, the form that the accounting manager sees is not the original PO form but the PO form with the special “Manager Section” appended to the bottom.

Each form field has a specific variable associated with it. This variable contains the information entered in the field. For example, the “Requestor” field has a corresponding variable called “Requestor.”





When creating the form that the accounting manager sees, instead of inserting a regular field and calling it "Requestor," we can simply insert the "Requestor" variable. This ensures that the field will be populated with the same information entered in the original PO when the accounting manager views it.

Fields	Variables
<input type="text"/>	Address
<input type="text"/>	Comment
<input type="text"/>	Contact
<input type="text"/>	Date
<input type="text"/>	Date1
<input type="text"/>	Department1
<input type="text"/>	Does_the_purchase_...
<input type="text"/>	manager
<input type="text"/>	Name
<input type="text"/>	Payment_Terms
<input type="text"/>	Payment_Terms1
<input type="text"/>	PO1
<input type="text"/>	Requestor
<input type="text"/>	Ship_To
<input type="text"/>	Shipping_and_Hand...
<input type="text"/>	Special_Instructions
<input type="text"/>	Specify_Reason
<input type="text"/>	Specify_reasons_if_p...
<input type="text"/>	Tax
<input type="text"/>	Telephone

In order to get the form to automatically calculate the item subtotal (multiplying the quantity by the item price) and overall order total (adding the item subtotals with the tax and shipping amounts), include the following JavaScript in the “CSS and JavaScript” page:

```

#of-forms-1 {
  background-color: #D3D3D3;
  margin-bottom: 0;
}

#document.ready(function () {
  $('#table-body').on('blur', 'input', subtotal);
  $('#tax').on('blur', 'input', subtotal);
  $('#shipping').on('blur', 'input', subtotal);

  function subtotal() {
    var sum = 0;
    $('#table-body tbody tr').each(function () {
      var s = 0;
      s = parseFloat($(this).find('input').val()) * parseFloat($(this).find('input').val());
      s = $(this).find('input').val() * $(this).find('input').val();
      sum += s;
    });
    sum += parseFloat($('#tax input').val()) + parseFloat($('#shipping input').val());
    $('#total input').val(sum.toFixed(2));
  }

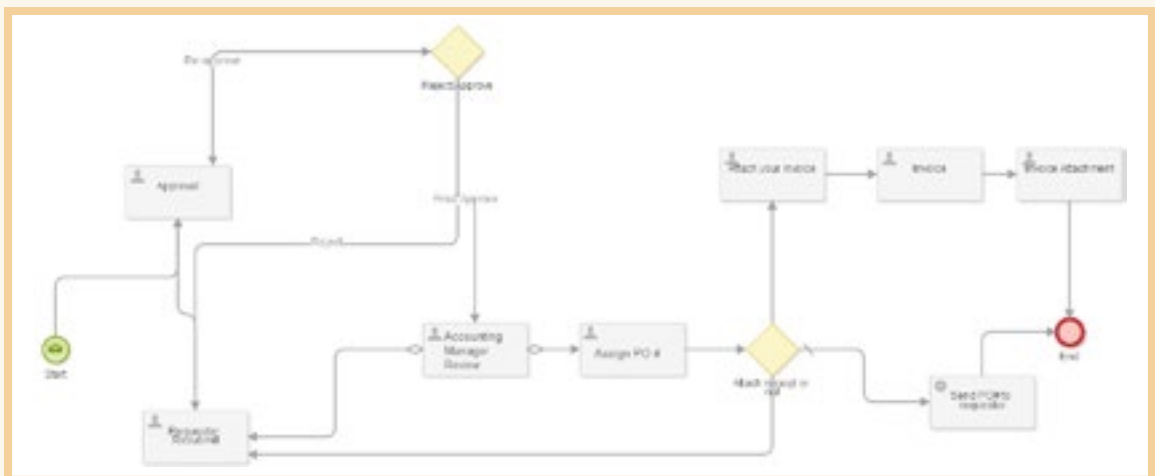
  function parameter() {
    var E = $('#table-body').find('input');
    $('#total input').val('');
  }

  $('#total input').on('ready', 'blur');
});

```

This code relies on the presence of CSS classes on specific fields. Be sure to add the appropriate CSS class to your fields or the code won't work. Exact code and instructions can be found in the Laserfiche Forms online help files.

The business process is modeled in the Laserfiche Forms Process Modeler. Here is what the process model looks like:



Actions performed by people, such as “Assign PO #,” are represented by user tasks. Actions performed by automated tools, such as “Sent PO # to Requestor,” are represented by service tasks. Routing decisions are represented by gateways.





## **BENEFITS OF LASERFICHE FORMS**

Streamlining the purchase order process with Laserfiche Forms results in the following benefits:

- ▶ Purchase orders can be signed electronically and easily routed from party to party without having to be manually carried around the office.
- ▶ Everything can be done in an efficient and timely manner as everyone involved is notified immediately of their upcoming tasks.
- ▶ Administrators can easily see where each PO is in the process and the duration of each process step. If there's a problem or slow-down, it's easy to identify and correct that part of the process.

# PURCHASE REQUISITIONS PROCESSING: DCD GROUP

**Industry:** Commercial

**Number of Employees:** 501 – 1,000

**Headquarters:** Duncanville, Vereeniging, South Africa

Based in South Africa, DCD Group comprises four different divisions: rail, mining and energy, marine, and defense. There are 1,300 full-time employees at DCD Group headquarters, which equates to a large number of purchase requisitions that need to be created, submitted and approved on a regular basis. Here is how DCD Group used Laserfiche Forms and Laserfiche Workflow to make the purchase requisition process paperless from start to finish.



*Dawie Marais, General Manager Support Services, describes DCD Group's electronic purchase requisition creation and approval process.*

## THE LEGACY PROCESS

Before Laserfiche, purchase requisitions were filled out by hand. An employee would look up department and expense codes and write them in.

Item No.	Qty	Description and size	Unit	Value
1		Coping steel		220.00
2		Handwritten description		
3				
4				
5		Handwritten description		
6		Handwritten description		
7				
8				
9				
10				

Once a purchase requisition was filled out, it had to be signed by a manager to signify approval. A particular manager can only approve a purchase requisition for a certain amount. The larger the amount on the purchase requisition, the higher up in the hierarchy the manager must be to approve it. For example, while a requisition for R5,000 can be approved by the line manager, one for R25,000 must be approved by the general manager.

This paper process was inefficient and laborious because it required the employee to find the manager and obtain his signature. Often, the expense and department codes were incorrect and the writing on the form was difficult to read.

## THE CURRENT PROCESS

DCD Group's new purchase requisition process is completely paperless from start to finish. Here is what the new process looks like:

- ▶ An employee logs into Laserfiche Forms and opens the Purchase Requisition form.

**DCD Purchase Requisition**

**PR Type**

**PR Number**   
This number will be automatically be assigned.

**Requestor**   
Please type your Name and Surname

**PR Date**

**Required before**

**Reason For Purchase**

**Project Number**

**Department Code**

**Description**

**Cost Code**

**Buyer**

**General Manager**

**Head Of Department**

**Line Manager**

**Goods**

QTY	Description	Unit Cost	Line Amount
1	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>



- ▶ The employee fills out the form.
  - Each purchase requisition has a unique “PR No” which is automatically assigned.
  - Certain fields, such as Department Code, Description, Cost Code and Buyer are drop-down fields.
  - The form uses database lookup rules to help fill out the Line Manager, Head of Department and General Manager fields based on the department code.
  - An employee can upload a supplier quotation document, if one is already available, directly from the form.
  - The employee can save the form to finish later if he needs to obtain additional information.

**Add Supplier Quotations**

Or drag files here

Save unfinished form to complete later

- ▶ Once the form is submitted, it is converted into Tiff format and stored in Laserfiche along with the supplemental supplier quotations (if any). Laserfiche Workflow monitors the folder for new form submissions. The workflow extracts the data from the form fields and converts them into tokens using the “Retrieve Laserfiche Form Content” activity.

The screenshot shows the Properties dialog for the activity "Retrieve Laserfiche Forms Content". The dialog is organized into several sections:

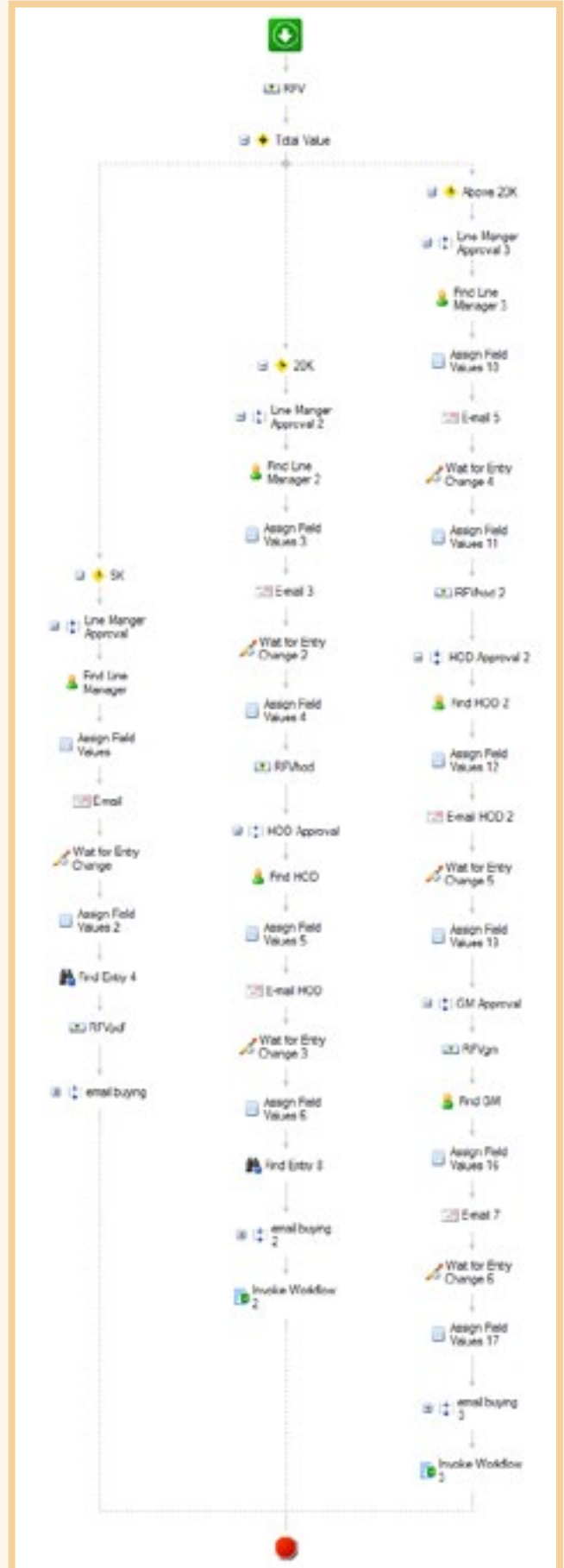
- Activity Name:** Retrieve Laserfiche Forms Content
- Activity Description:** Retrieves the values from a Laserfiche Forms business process instance and stores those values as tokens.
- Server:** HEVDM5, Host: http://localhost:81/Forms, Authentication: Default Authentication
- Fields:** DCD Purchase Requisition(1). A list of fields is shown, including Goods [Table], Goods (Description) [Text], and Goods (Description) [Text] (repeated 10 times).
- Process Instance:** Retrieve the content from:  The instance that started this workflow,  The instance with ID: %RFVD\_Instance Id. Retrieve the content at the time of:  The most recent submission (when the workflow started),  The submission with ID: %RFVF\_Submission Id.



- ▶ The workflow also calculates the line item value and the total for the whole purchase requisition using “Token Calculator” activities. The data from the form fields and the calculated data are then all entered into the outside SQL database. Data from the database is then used to populate the purchase requisition’s document template. Here is a screenshot of this workflow design:



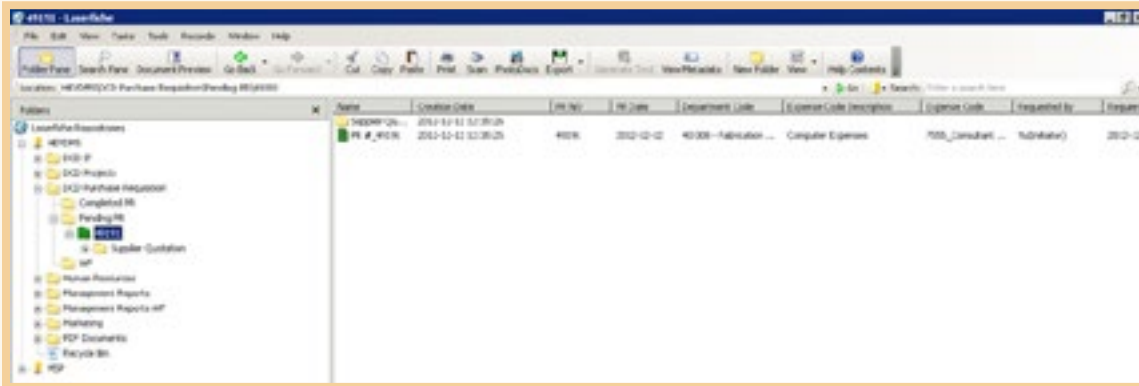
- ▶ This workflow invokes a second workflow, which looks at the PR Total field and notifies the appropriate managers that they have a purchase requisition to review. For example, if the total is R5,000 or less, only the line manager is notified, but if the total is R20,000 or higher, the line manager, head of department and general manager are all sent notifications. Here is a screenshot of this workflow design:







- ▶ The manager can view all the information on the purchase requisition by simply looking at the various columns in the folder browser. He can also automatically see the related supplier quotations in the “Supplier Quotation” folder.



- ▶ Once approved, another workflow populates an empty PDF purchase requisition form with the values from the template. The resulting PDF document looks like this:

DCD HEAVY ENGINEERING

**PURCHASE REQUISITION**  
 PR NO: 9076  
 Date: 12 December 2012  
 QR No: 9076A

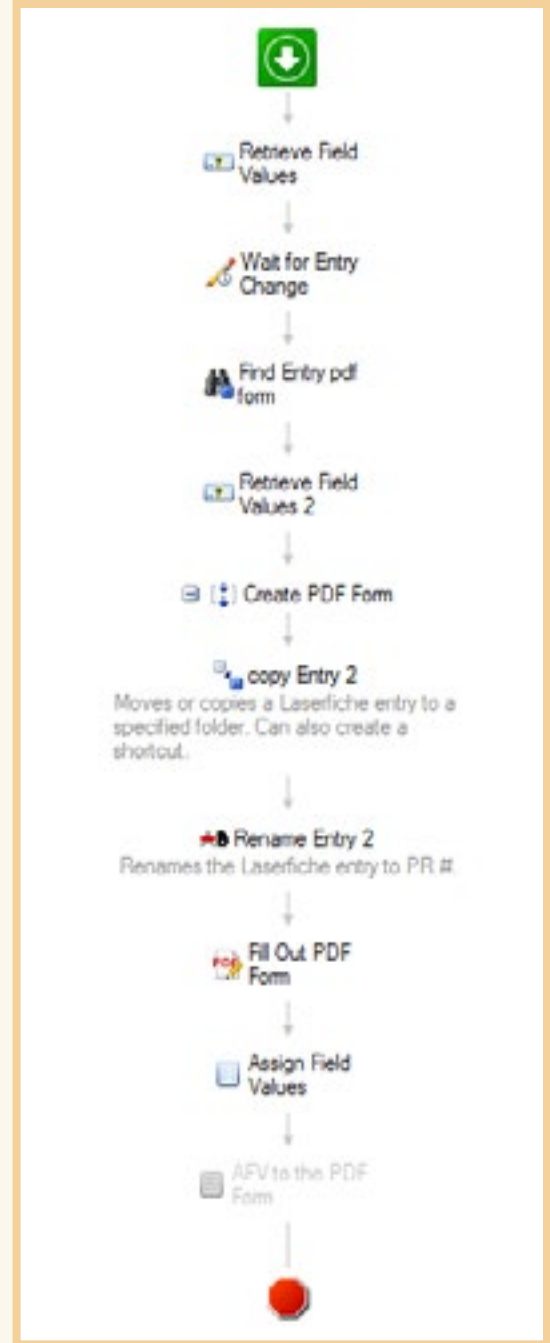
<b>Department Code:</b>	40-000 - Fabrication Shop
<b>Expense Code:</b>	7000-Consultant Fees Computer Expense

PLEASE PURCHASE THE FOLLOWING:

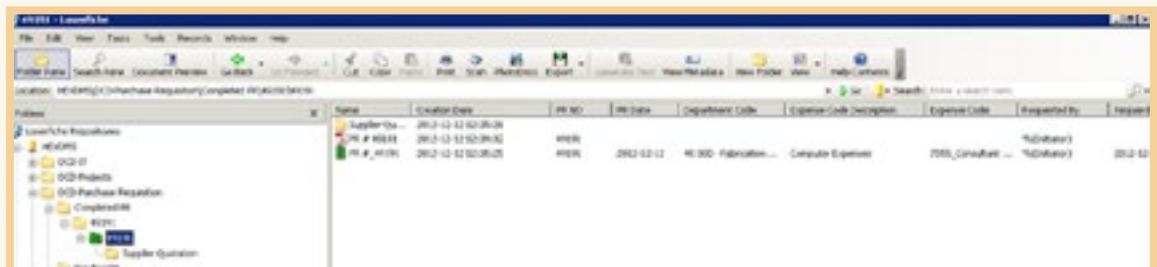
Item No.	QTY	Description	Unit Cost	Line Amount
1	12	Laserfiche Installation	100	1200
2	12	Scanners Installation	45.0	540.0
3	0		0	0
4	0		0	0
5	0		0	0
6	0		0	0
7			0	0
8			0	0
9			0	0
10			0	0
<b>Total</b>				1740.0

<b>REASON:</b> Testing of PR process	
<b>REQUIRED BEFORE:</b> 12 December 2012	<b>REQUESTED BY:</b> ADMIN
<b>SUPPLIER:</b> Netrus Vee	
<b>LINE MANAGER:</b> Jacques Engelbrecht 12 December 2012	

- ▶ Here is what the workflow that populates this PDF form looks like:



- ▶ The final product requisition is moved to the “Completed PR” folder in the Laserfiche repository.





## **BENEFITS OF LASERFICHE**

Automating the purchase requisition process has resulted in the following benefits for DCD Group.

- ▶ Productivity has improved significantly because employees no longer have to chase down managers to obtain signatures.
- ▶ All documentation is easily accessible because it is electronic and stored in a single location.
- ▶ Laserfiche is so easy to use that it took Support Services only four days to roll out the whole process within the organization.

# STUDENT SERVICES: COLLEGE OF THE DESERT

**Industry:** Higher Education

**Number of Employees:** 501 – 1,000

**Headquarters:** Palm Desert, CA

**Integration:** Datatel Student Information System

With more than 10,000 enrolled students, the College of the Desert's financial aid and admissions/records departments process a large number of applications and petitions. Here is how these two departments have improved processing time by 40% with Laserfiche Forms.



Learn how Laserfiche Forms transformed student services at College of the Desert.

## LASERFICHE FORMS AND LASERFICHE WORKFLOW

Once a student is logged into the online student portal, she is able to access all the forms offered by the college.

The screenshot displays the MyCOD student portal interface. At the top, there is a navigation bar with the MyCOD logo and user information. Below the navigation bar, there are several main sections:

- Quick Launch Navigation:** A sidebar menu with categories like "Edit Preferences", "Unassigned", "Links", "Financial Aid Forms", and "A&R Forms". Under "A&R Forms", there is a list of specific forms such as "AB-140", "Academic Renewal", "Certificate Application", "Declare/Change Major", "Degree Application", "Duplicate Certificate Request", "Duplicate Diploma Request", "Name Change", "Petition for Exception to Policy", "Re-Think Kappa", "Residency Questionnaire", "SSN Update", and "Supporting Documents Upload".
- MyCOD Notifications:** A section for messages and preferences, currently showing "There are no Alerts for you." and "Showing 0 to 0 of 0 results."
- Calendar:** A calendar view for April 2014, showing events for each day. The events listed are:
  - Tuesday, 4/1:** 2:00 PM Student Success Workshop; 3:10 PM Career Workshop: Exploring Career Options (Career Center)
  - Wednesday, 4/2:** 11:00 AM Career Workshop: Researching Education Requirements (DISC 237)
  - Thursday, 4/3:** 4:00 AM Late Registration 7:00 AM: Drop Advisor Registration for available courses; 1:00 PM Scholarship Workshop: Scholarship Resources - CSJC 237
  - Friday, 4/4:** 1:00 PM Scholarship Workshop: Scholarship Resources - CSJC 237
  - Saturday, 4/5:** 1:00 PM Scholarship Workshop: Scholarship Resources - CSJC 237
  - Sunday, 4/6:** 2:00 PM Student Success Workshop
  - Monday, 4/7:** 2:00 PM Student Success Workshop
  - Tuesday, 4/8:** 2:00 PM Student Success Workshop
  - Wednesday, 4/9:** 11:00 AM Career Workshop - Job Search Skills Job
  - Thursday, 4/10:** 1:00 PM Scholarship Workshop

At the bottom of the page, there is a footer with contact information for the College of the Desert and a copyright notice for 2013.

The student selects the form she'd like to fill out from the list. In this case, she will select the Degree Application form. This will open the form in Laserfiche Forms.

**COLLEGE of the DESERT** **DEGREE APPLICATION**

Please follow the instructions below.

### DEGREE APPLICATION

- 1. Degree Application (this form) must be filed with Admissions & Records by the following deadline:
  - **Fall Semester—1st Tuesday of November**
  - **Spring/Summer Semester—1st Tuesday of March-** for current year Commencement Ceremony\*
  - **Summer Semester—1st Tuesday of June** – for following year Commencement Ceremony\*
- 2. Prior to submission of Degree Application:
  - a. It is strongly recommended that students speak with a counselor regarding graduation.
  - b. Students must have completed 40 units, at least 12 units at College of the Desert
  - c. Official Transcripts from all colleges attended must be on file with Admissions & Records. Please note that equivalencies may not be possible without course descriptions for classes taken prior to 1995. Contact your prior institutions attended to obtain course descriptions with approved General Education areas and attach them to the Application to Graduate.
  - d. If you are currently enrolled in another institution, please attach your current class schedule. (only if the course is required for this degree)
- 3. An official evaluation will be emailed to the student regarding graduation status.
- 4. If student wishes to participate in commencement ceremony in May:
  - a. Degree Application must be submitted prior to Spring Semester deadline (see above\*).
  - b. Follow the instructions in the Grad Packet available online in April.
  - c. Student **must confirm participation** in the ceremony with the COO Bookstore by the posted deadline: 2nd Friday of May.
- 5. Diplomas are mailed to the address indicated on the graduation application approximately 12 weeks after the end of the term.

The student fills out the form and submits it. Field constraints prevent the student from populating incorrect data. For example, the student ID number must be seven digits long.

I give permission for my name, major and graduation honors to be printed in media.  Yes  No

I give permission to release my email & mailing address required by the Commencement Photographer.\*  Yes  No  
A "NO" choice means the Photographer will not be able to deliver your proofs or see photo.

I am member of Phi Theta Kappa.\*  Yes  No

### Student Declaration

Student Initials:\*

I hereby certify, under penalty of perjury, that the information provided in this form is complete and accurate and that I have read and understand the information in both pages of this form. I understand it is my responsibility to monitor my college email account for results of this request.

Please type your Full Name\*  This constitutes as e-signature.

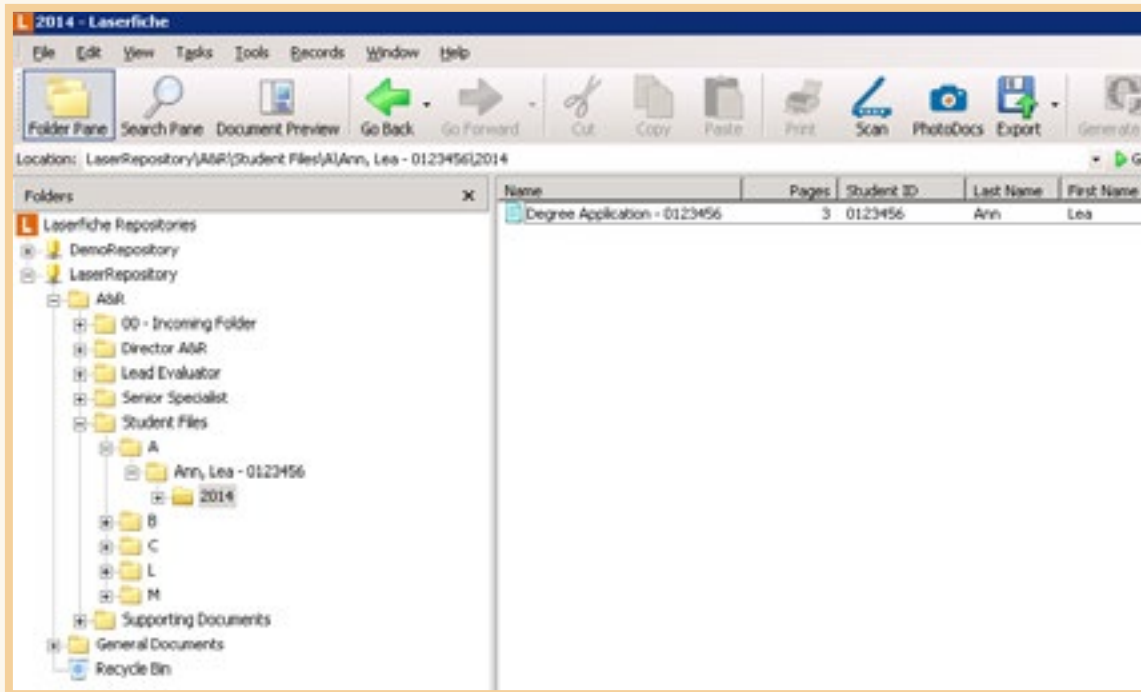
Date\*

**File Upload** Attach any supporting document(s) if required for the application. (Each file size not to exceed 5 Megabytes.)  
  
Or drag files here.

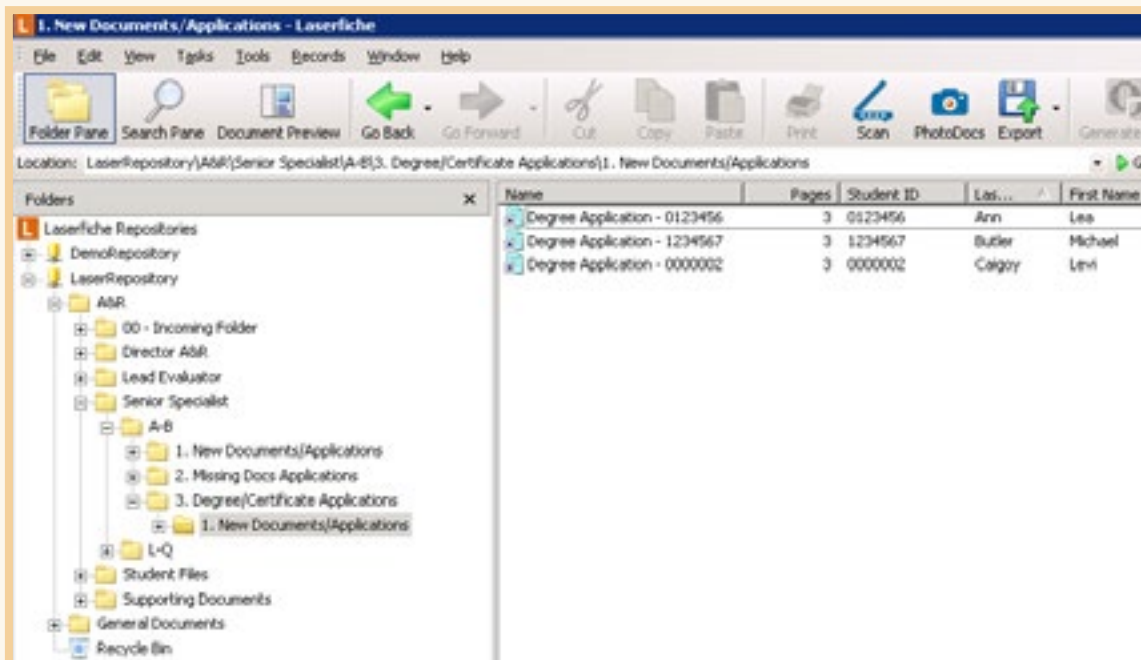
Processing time usually takes up to 15 business days. However, processing time may take 6 weeks during peak periods (January, June, and December)



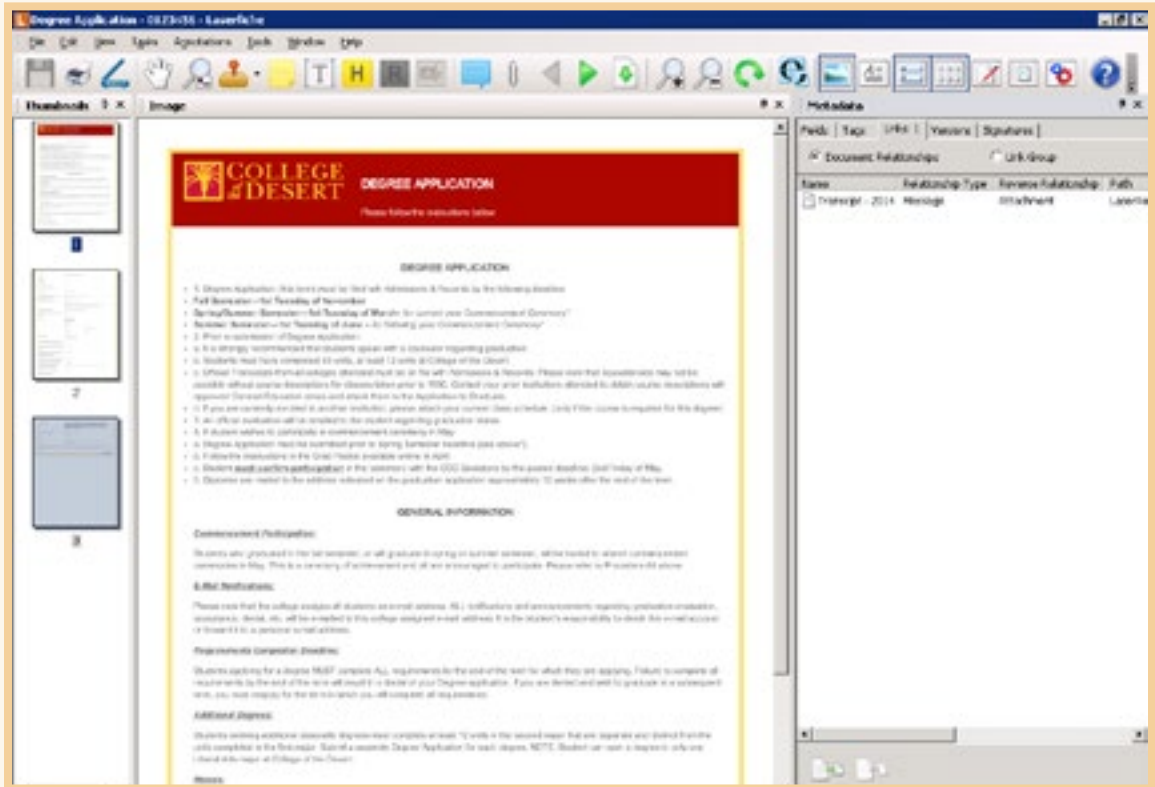
Once submitted, Laserfiche Forms saves a copy of the application in the student's folder in Laserfiche.



Laserfiche Workflow creates a shortcut to the application in the senior specialist's New Applications folder.



The senior specialist opens the new application and reviews it. As part of the review process, the senior specialist needs to look over supplementary information such as transcripts. To make this easy for the reviewer, Laserfiche Workflow links each new application with a folder containing related supplemental documents as soon as new applications enter the Laserfiche repository. The senior specialist can open the folder of supplemental materials directly from the Links tab in the metadata pane.







The senior specialist reviews everything and approves the application by changing the value of the Specialist's Decision field.

**COLLEGE of DESERT DEGREE APPLICATION**  
Please follow the instructions below.

**DEGREE APPLICATION**

- 1. Degree Application: This form must be filed with Admissions & Records by the following deadline:
- Fall Semester - the Tuesday of November
- Spring/Summer Semester - the Tuesday of March for current year (concurrent semester)
- Summer Semester - the Tuesday of June - for taking your Concurrent Semester

**GENERAL INFORMATION**

**Consentment Notification:**  
Students who graduate in one semester, or all graduate in two or more semesters, must consent to attend concurrent semesters in May. This is a necessary requirement and all are encouraged to participate. Please refer to Procedures 601-0006.

**E-Mail Notification:**  
Please note that the college notifies all students in email address. All e-mail notices and communications regarding graduation completion, acceptance, denial, etc. will be e-mailed to the college assigned e-mail address. It is the student's responsibility to check the e-mail address assigned to them in a personal e-mail address.

**Prerequisites Completion Deadline:**  
Students applying for a degree MUST complete ALL requirements by the end of the term in which they are applying. Failure to complete all requirements by the end of the term will result in a denial of your Degree application. Extra are denied and will not graduate in a subsequent term, you must reapply for the term within you are complete all req. courses.

**Additional Notes:**  
Students seeking additional coursework (degree-over completion) must file in the second year that you register your Degree transfer units completed in the first year. You file a second Degree Application to each degree. NOT: Student can take a degree-over only one time and no more at College of the Desert.

**Notes:**

**Template: ASR**

Student ID (required)  
0123456

Last Name  
Ann

First Name  
Lisa

Student E-mail Address  
Lisa\_Ann.123@collegeofdesert.edu

Permanent e-mail address  
A123@Gmail.com

Semester  
Summer

Graduation Year  
2014

ASR Form Type  
Degree Application

Specialist's Decision  
Approved

Approved  
Pending Documents  
Denial  
Send Application to Lead Evaluator  
Send to Senior Specialist Review Folder  
Send Application to Director

This action sends the application to the lead evaluator for final review. Laserfiche Workflow deletes the shortcut from the senior specialist's folder and creates a new shortcut in the lead evaluator's folder.

**Lead Evaluator - Laserfiche**

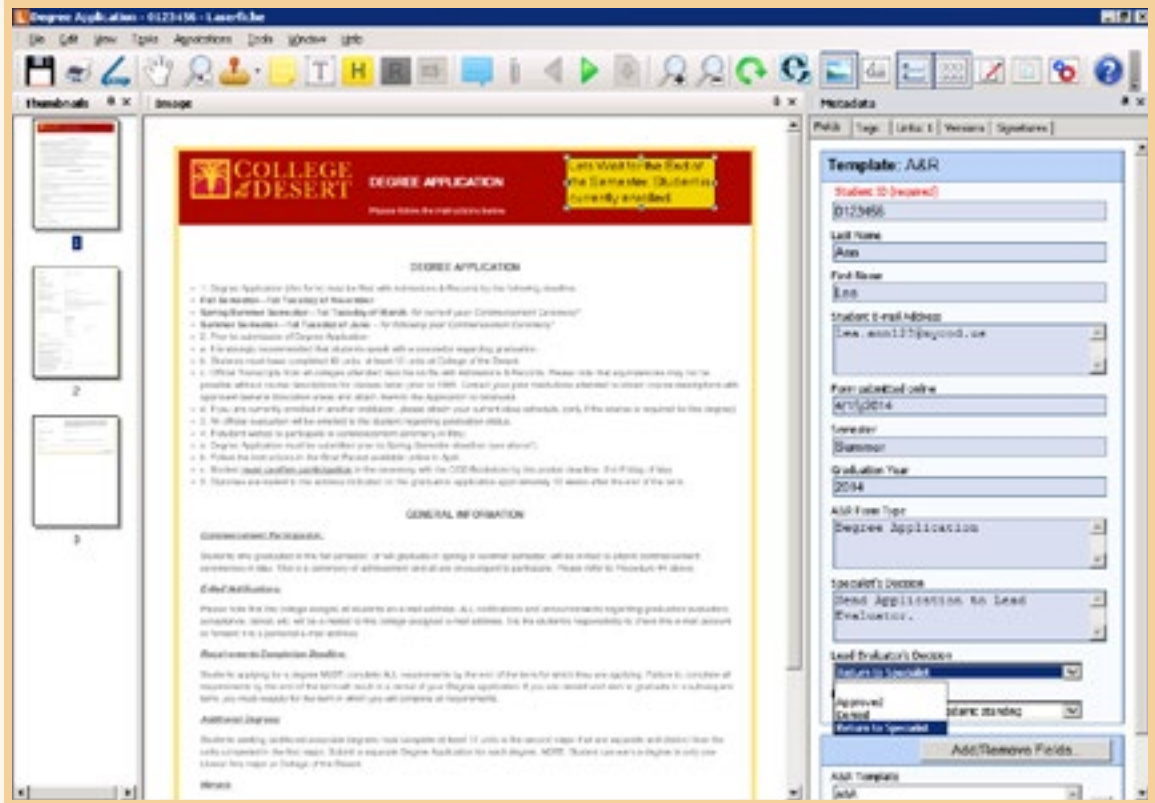
Location: LaserRepository\ASR\Lead Evaluator

**Folders**

- Laserfiche Repositories
  - DenofRepository
  - LaserRepository
    - ASR
      - 00 - Incoming Folder
      - Director ASR
      - Lead Evaluator
      - Senior Specialist
      - Student Files
      - Supporting Documents
    - General Documents
    - Recycle Bin

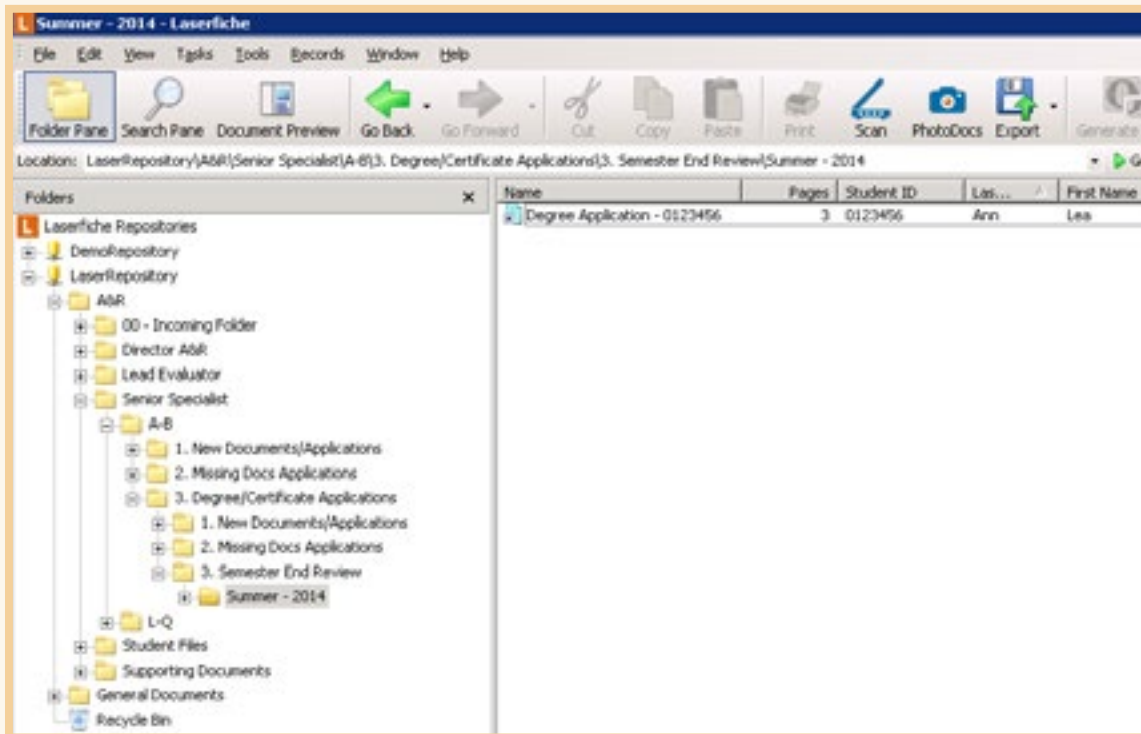
Name	Student ID	Last Name	First Name	Specialist's Decision
Degree Application - 0123456	0123456	Ann	Lisa	Send Application to Lead Evaluator

The lead evaluator opens the application and views the transcript. He determines that the student is enrolled in classes currently and must pass them before she can apply for a degree. The lead evaluator makes a note of this using the Text Box annotation and sends it back to the senior specialist, who will review the application at the end of the semester.





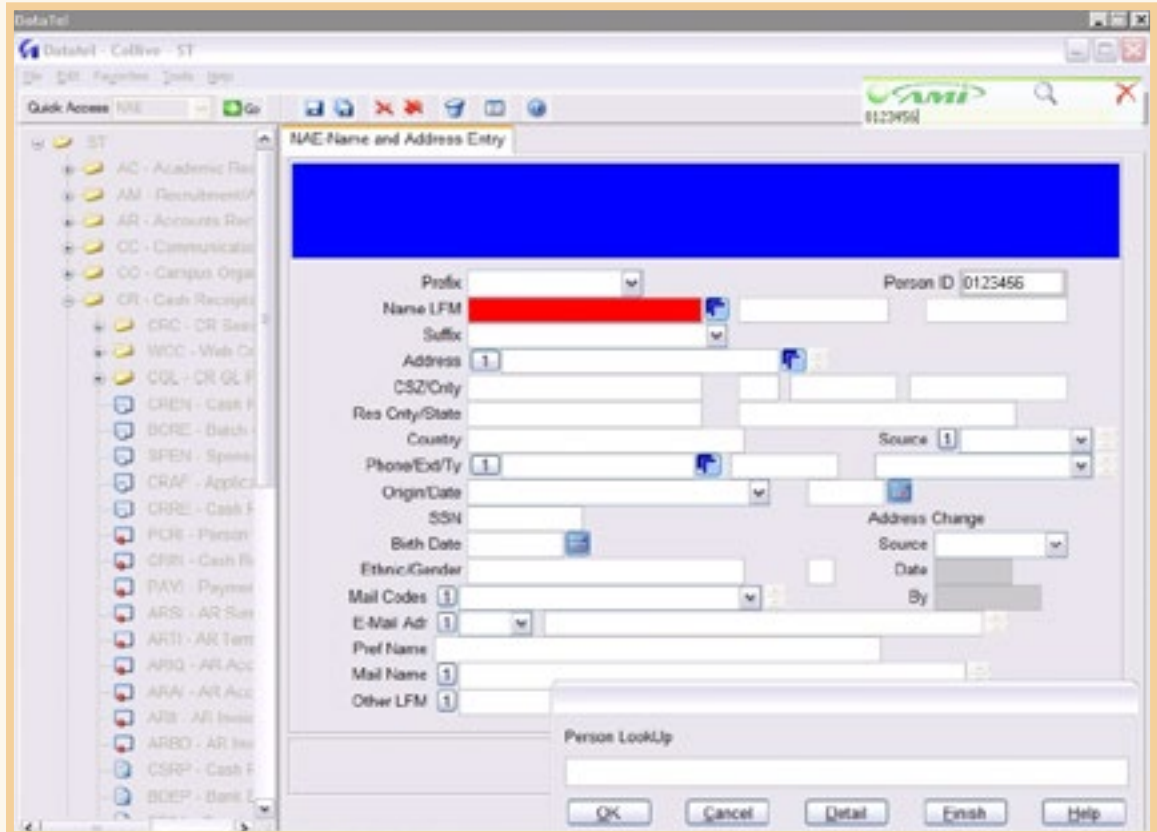
This action prompts Laserfiche Workflow to delete the shortcut from the lead evaluator's folder and create a new one in the senior specialist's New Applications folder. The senior specialist opens the application and views the lead evaluator's note. She changes the value of the Specialist's Decision field to Semester End Review, which tells Laserfiche Workflow to move the application shortcut to the appropriate folder for later review.



At the end of the semester, the senior specialist opens the application again, reviews it, approves it and sends it back to the lead evaluator. The lead evaluator also opens the application and approves or denies it. The student is notified of the decision by email and the application is stored in the student's file.

## LASERFICHE INTEGRATION WITH DATATEL

Laserfiche has been integrated with the college's Datatel Student Information System. All student documents are available at the click of a button directly from within the student's record in Datatel.



This integration allows users to view everything from one system and prevents them from having to switch between software applications. If the student outlined above inquires about the status of her application, the admissions employee can simply open Datatel, find the student by ID and view all of the student's applications without having to open Laserfiche.



## **BENEFITS OF LASERFICHE**

Automating application and petition processing with Laserfiche has resulted in the following benefits for College of the Desert:

- ▶ Application and petition processing time has improved by 40%.
- ▶ The student worker who used to spend all of his time scanning forms has been delegated other tasks.
- ▶ All documents are named consistently, which makes them much easier to find when needed.
- ▶ Students prefer to fill out applications online resulting in shorter lines at financial aid and admissions/records windows.
- ▶ Phone calls and inquiries to the financial aid and admissions/records departments have been significantly reduced since students are now notified about the status of their applications as they move through all stages of the approval process.



# PROJECT MANAGEMENT

A project can involve many people, each with their own functions and responsibilities. Laserfiche Forms facilitates project management by helping to assign different steps in the process to the appropriate people while maintaining transparency at each step.

This section contains examples of how Laserfiche Forms can simplify various aspects of project management.

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# PROJECT MANAGEMENT

**Job Functions:** Department Managers, Project Managers, Project Coordinators

**Business Process:** Managing Department Projects

**Integration:** ScrumWorks Project Management

Most departments at Laserfiche follow the Agile Project Management methodology. Projects are assigned weekly and broken into tasks. Task status and any impediments are discussed in short, daily meetings called standups. Here is how the presales department streamlined project requests with Laserfiche Forms, Laserfiche Workflow and an integration with the ScrumWorks project management software.





*The presales manager at Laserfiche describes how Laserfiche Forms, Laserfiche Workflow and an integration with ScrumWorks streamlined project management in the presales department.*

## LASERFICHE FORMS

To request presales assistance with a project, a Laserfiche employee fills out the Presales Assistance Request form in Laserfiche Forms. When the employee opens the form, one field appears.

Once a user selects an option from the drop-down menu, additional fields relevant to the selection appear. For example, if the user selects RFP (Request for Proposal), the rest of the form is populated with questions regarding the RFP. To limit incomplete submissions, important fields are marked as required. Using the File Upload field, users can upload supplemental documents such as a list of RFP questions or technical requirements that need to be addressed by the presales engineer.

Once the form is submitted, Laserfiche Forms routes it to the presales manager, who reviews the project. If the project request is unclear or lacks certain information, the presales manager clicks the “Need more info” button and Laserfiche Forms automatically sends an email to the form submitter asking him to provide more information and resubmit. If the presales manager accepts the project, he assigns an engineer from a drop-down list and clicks “Approve”.

### RFP Info

The VAR is expected to answer as many questions as possible before requesting our help.

---

Company Name\*

Company Industry\*

What do we need to do? List the questions/sections we need to answer. Submitters with insufficient details will be rejected.

Who is the VAR?\*

Due on\* Minimum one week notice.

---

### Upload Files

Any additional documentation is helpful. You can add more than one document here.

---

File Upload

Or drag files here

LaserWorks technical Requ... 0.54KB

---

### Approval

Presales Engineer\*

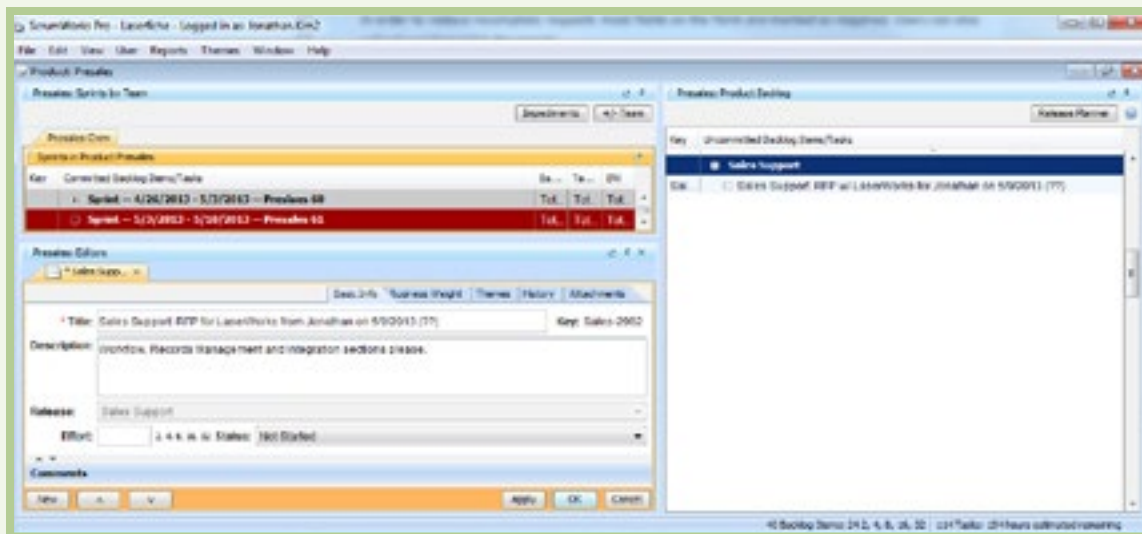
---

#### Actions for Presales Manager Approval

Comments

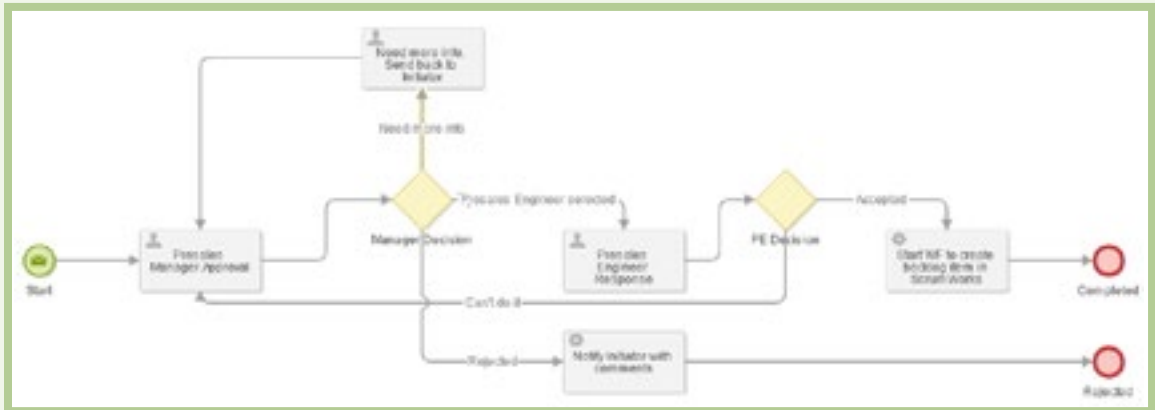


Laserfiche Forms sends an email with a link to the form to the engineer assigned to the project. He can then accept the project or reject it if he has schedule conflicts. Once the engineer accepts the project, Laserfiche Forms invokes a workflow that creates a backlog item in ScrumWorks, the program that tracks the progress of the project during daily standups.

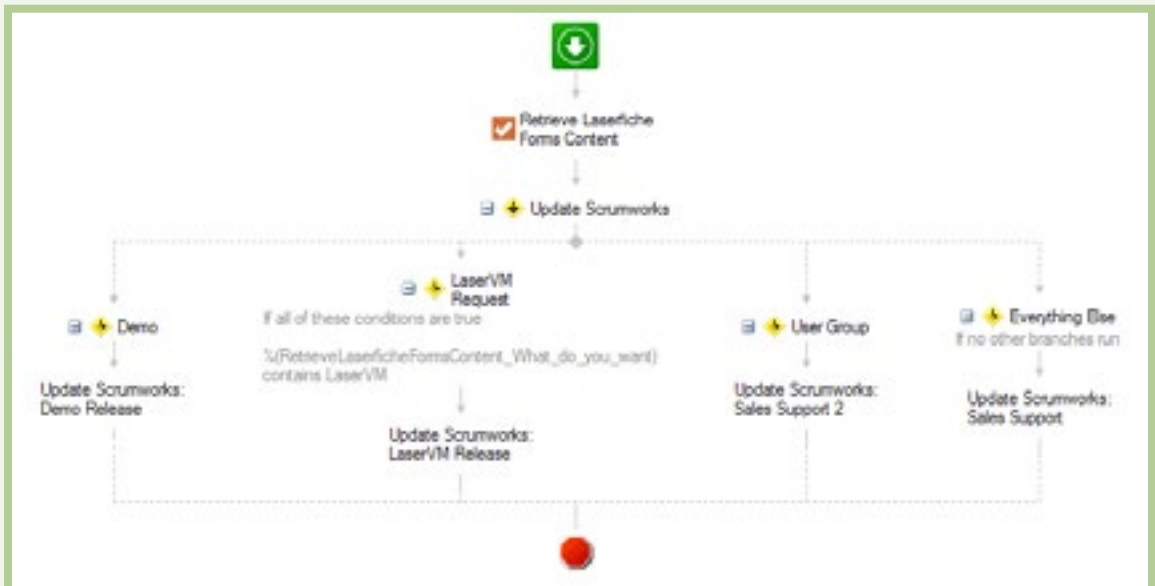


## BEHIND THE SCENES

The Laserfiche Forms process is mapped out in the Laserfiche Forms Process Modeler:



The workflow is created in the Workflow Designer:





This workflow does the following:

- ▶ Extracts the contents of the form fields and converts them to tokens using the “Retrieve Laserfiche Forms Content” activity.

**Properties**

Retrieve Laserfiche Forms Content

**Activity Name**

Retneve Laserfiche Forms Content

**Activity Description**

Retrieves the values from a Laserfiche Forms business process instance and stores those values as tokens.

**Server**

forms

Host: <https://secure1.laserfiche.com/forms>

Authentication: wfuser

**Fields**

Presales Assistance Request

- Initial Business Process [Text]
- Initial Business Process [Text]
- Location [Text]
- Process Details [Text]
- Process Details [Text]
- Submitter Name [Text]
- Webinar Title [Text]
- Webinar Title [Text]
- What do we need to do? [Text]
- What do we need to do? [Text]

- Uses a custom ScrumWorks activity to add the project as a backlog item to ScrumWorks. This project can then be assigned to an engineer during weekly project planning. The different configuration options correspond to the different sections in the ScrumWorks backlog item.

Detailed information about Workflow custom activities can be found in the Building Custom Activities in Workflow (VB.NET) white paper or the Building Custom Activities in Workflow (C#) white paper.

The screenshot shows a 'Properties' window for a custom activity. The window title is 'Properties' and it has standard window controls (minimize, maximize, close). The main content is organized into several sections:

- Update Scrumworks: Sales Support**: A dropdown menu showing the selected activity name.
- Activity Name**: A text box containing 'Update Scrumworks: Sales Support'.
- Activity Description**: An empty text area.
- Connection Profile**: A dropdown menu showing 'LaserRepo: workflow@LaserRepository' and a 'Manage Connections...' link.
- Backlog Title**: A text box containing 'Sales Support: %(RetrieveLaserficheFormsCo' with a right-pointing arrow button.
- Backlog Description**: A text box containing a complex expression: '%(RetrieveLaserficheFormsContent\_WF\_ProcessDetails)%(RetrieveLaserficheFormsContent\_Discovery\_Details)%(Retrieve' with up/down arrows and a right-pointing arrow button.
- Release**: A text box containing 'Sales Support' with a right-pointing arrow button.
- Product**: A text box containing 'Presales' with a right-pointing arrow button.



## **BENEFITS OF THE LASERFICHE – SCRUMWORKS INTEGRATION**

With Laserfiche Forms, Laserfiche Workflow and a Laserfiche-ScrumWorks integration, the Presales Assistance Request process has significantly improved.

- ▶ Project assistance requests are completed with relevant information.
- ▶ Comprehensive email notifications keep the form submitter, the presales manager and the assigned presales engineer in the loop and on the same page.
- ▶ Projects are automatically posted to the ScrumWorks backlog as they are submitted, saving the presales manager time by not having to copy and paste new projects into the program.

# REPAIR REQUESTS

**Job Functions:** Department Managers, Customer Service Representatives  
**Business Process:** Processing Repair Requests

Laserfiche 9 integrates business process management and enterprise content management more tightly. It adds significant capabilities for automating business processes and gives organizations the management tools they need to make smarter decisions about the way knowledge work is carried out. Laserfiche Workflow 9 introduces business processes—or “super workflows.” Here is how to design a simple business process using Laserfiche Workflow 9.





*Zach Buck, Presales Engineer at Laserfiche, describes how to design a business process for a computer repair company using the new features in Laserfiche 9.*

## **THE SCENARIO**

In the context of this article, we will use the example of a computer repair shop. Before Laserfiche was implemented, the shop's business process was as follows:

1. A customer brings a broken computer to the shop. A secretary checks the computer in, fills out a special repair request form and takes photos of the computer. All of this documentation is stored in a newly created folder. The secretary then places a sticker on the computer with a Repair Request Number on it, assigns a technician to the repair and passes the broken computer and its folder to that technician.
2. The technician fixes the computer, and then passes it on to the quality control specialist.
3. The quality control specialist has two days to review the computer to make sure that it is completely repaired and then approves the repair. If the computer is not reviewed during that time period, the quality control supervisor must review and approve/deny the computer.
4. The secretary, notified of the repair status, contacts the customer to pick up the computer.

Here is how we have fully automated this process with Laserfiche 9 business processes.

## THE AUTOMATED PROCESS

1. When a customer brings a broken computer into the shop, the secretary checks in the computer and fills out an online form with details regarding the customer and the repair. The secretary also takes photos of the computer and attaches them to the form.

### Computer Repair Request

**Date of Request**

**Customer Name**

**Customer Address**   
Street Address

Address Line 2

City State / Province / Region

Postal / Zip Code Country

**Customer Phone Number (7)**

**Customer E-mail Address**

**Computer Serial Number**

**Repair Request Number**

**Computer Type**

**Description of problem**

**Technician Assigned**

Supplementary documents

Upload photo.

Or drag files here

**Ted Taylor Photo 1.jpg** 19.76KB

[Add](#)



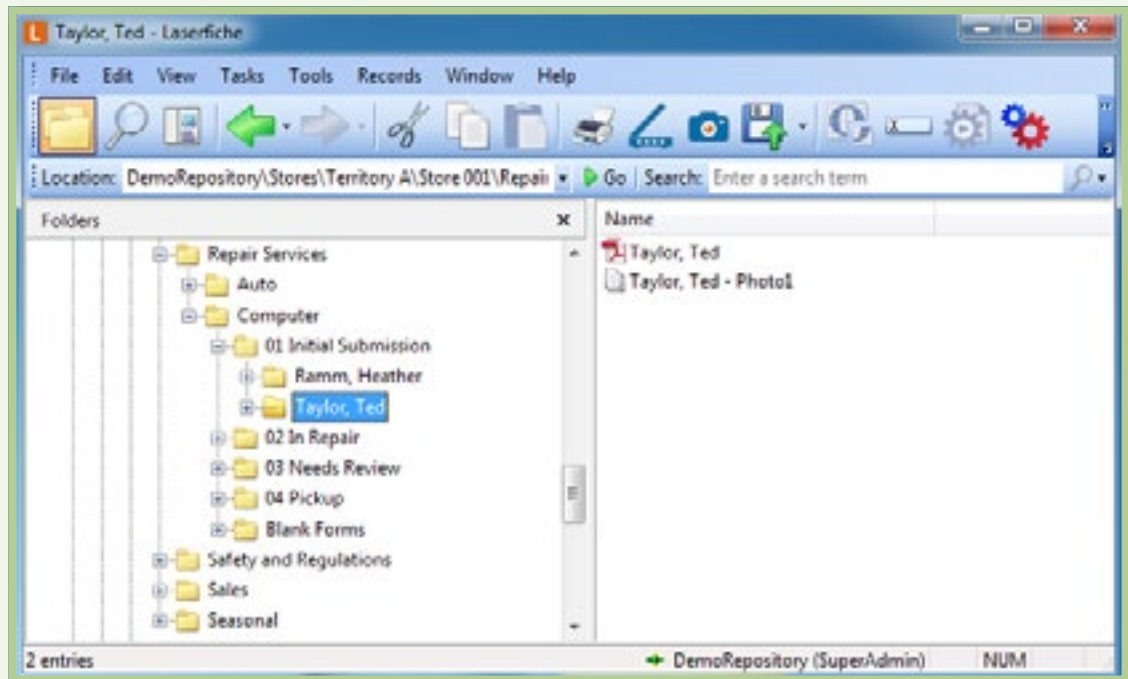
2. As soon as the form is submitted, it is sent to the Laserfiche repository along with the attached photos and converted to PDF, with the "Repair Order" template automatically assigned and metadata filled out.

The screenshot shows a software window titled "Metadata - Taylor, Ted". It features three tabs: "Fields", "Tags", and "Links". The "Fields" tab is active, displaying a form titled "Template: Repair Order". The form contains the following fields:

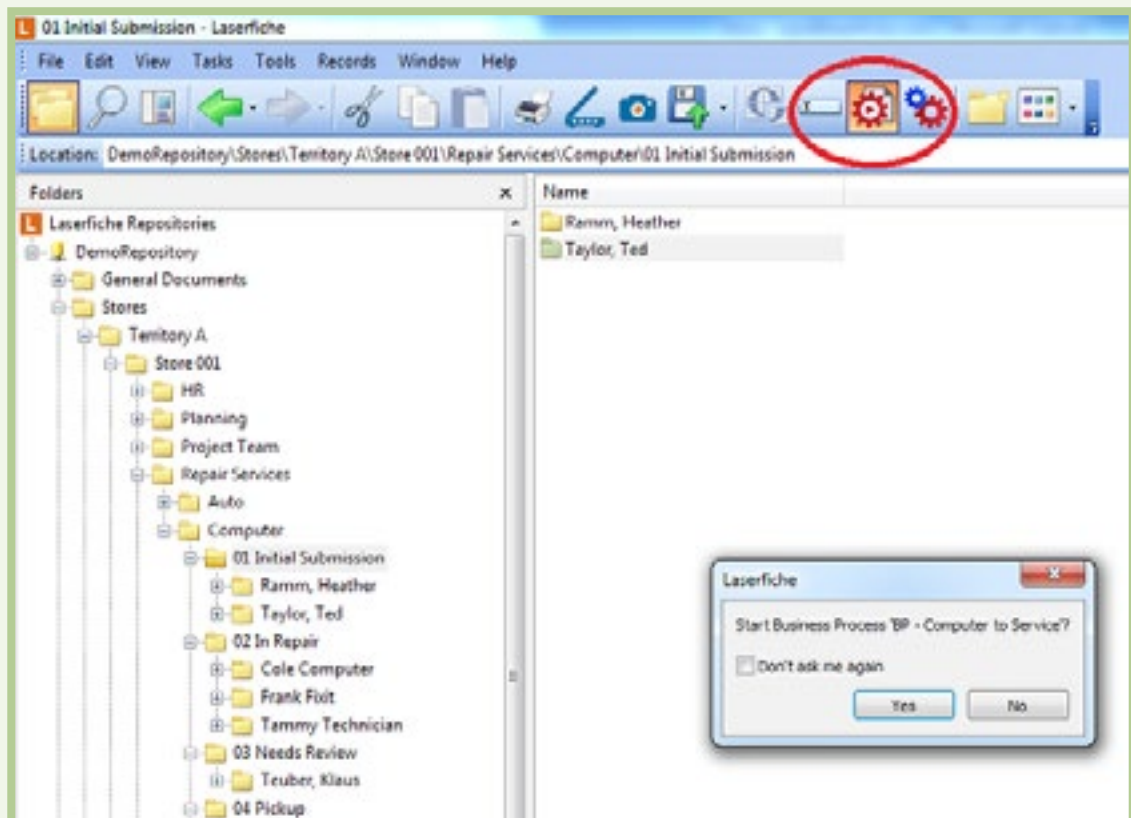
- Request Date: 12/26/2012
- Customer Name: Ted Taylor
- Customer Phone Number: 562988 1688
- Customer Email: ted.taylor@yahoo.com
- Repair Request Number: A891983X
- Description of problem: Laptop monitor flickers.
- Computer Serial Number: A156-0789P-LK9200
- Computer type: Laptop
- Technician Assigned: Tammy Technician
- Repair Status: Submitted
- Repair Notes: (empty text area)

At the bottom of the form area is a button labeled "Add/Remove Fields...". At the bottom of the window are three buttons: "OK", "Cancel", and "Help".

3. Both the form and photos are stored inside a new customer folder, which is filed in the "01 Initial Submission" folder in the Laserfiche repository.

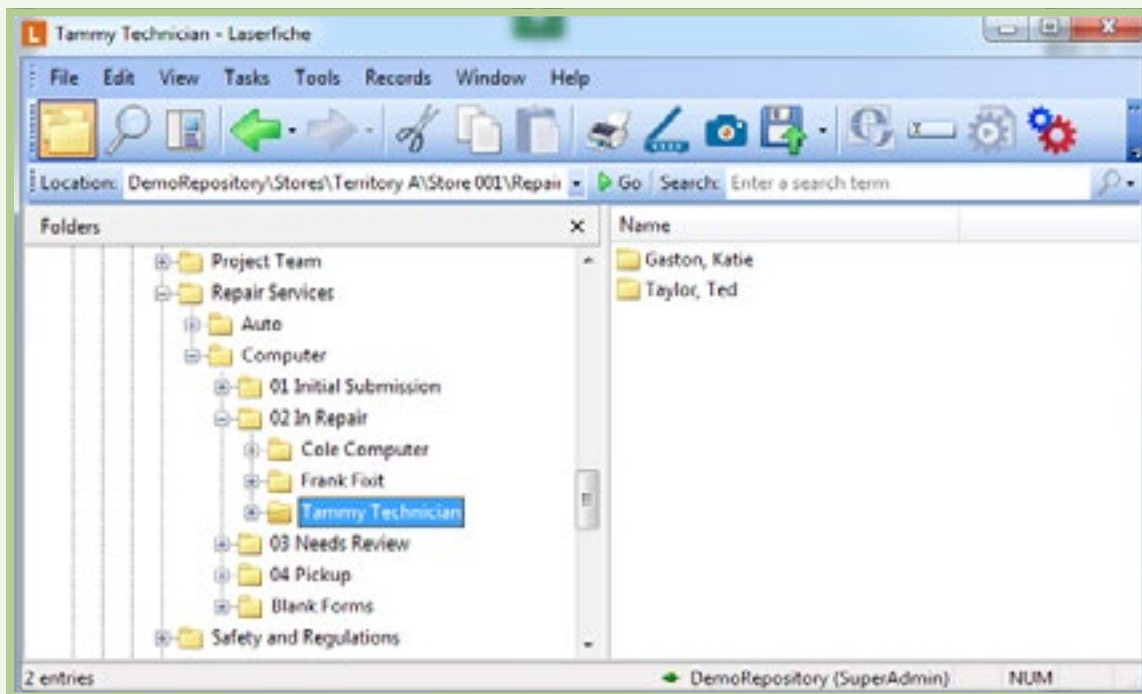


4. The secretary does not want this process to start until the unit is prepared for repair and the correct sticker is placed on the computer. He ensures everything is in place and manually initiates the Computer Repair business process on the repair request folder by clicking a button in the toolbar.

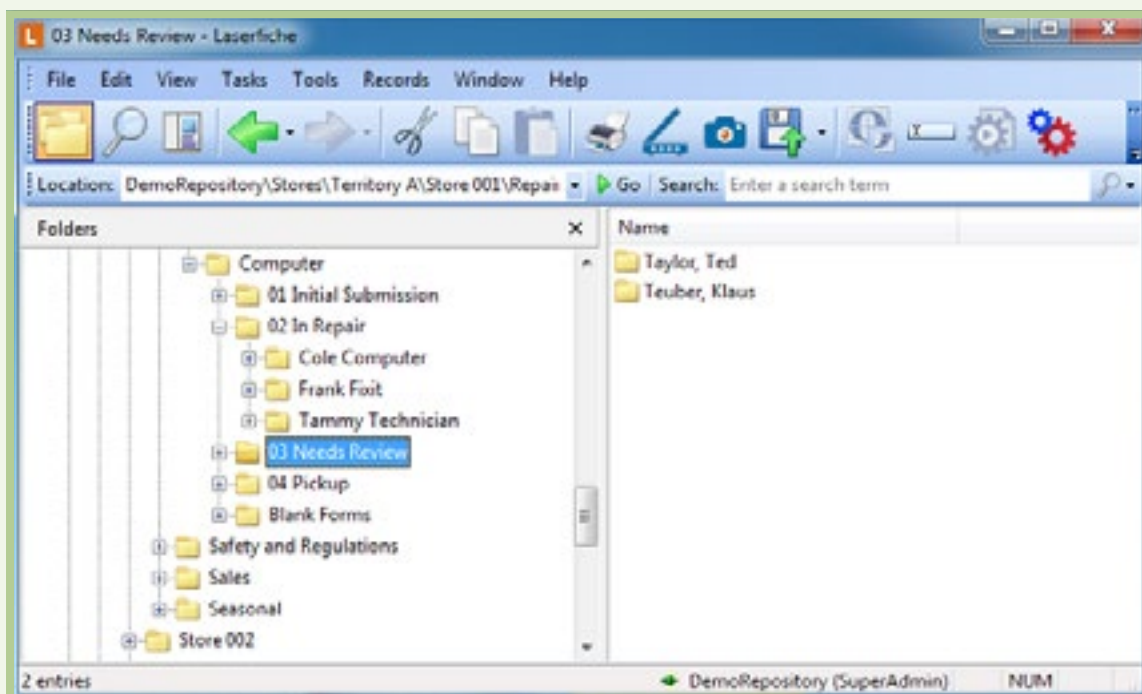




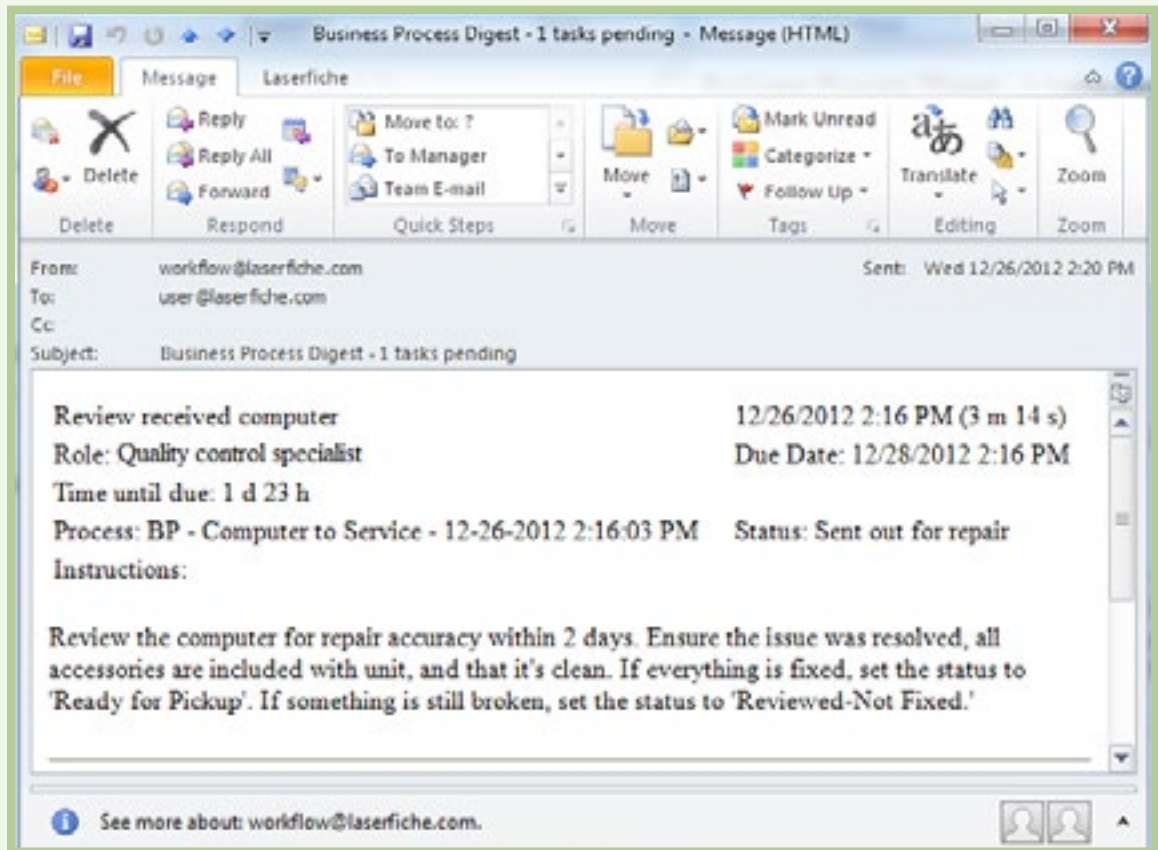
5. Laserfiche Workflow routes the client folder to the assigned technician's folder. In this case, Tammy Technician's folder. Tammy will get a daily email with a list of any computers in her work queue.



6. Once Tammy Technician fixes the computer, she updates the "Repair Notes" field and changes the value of the "Computer Status" field to "Requires Review." Laserfiche Workflow then routes this folder to the "03 Needs Review" folder.



7. The quality control specialist has two days to review the computer. If he doesn't update the "Computer Status" field to "Ready for Pickup" or "Reviewed – Not Fixed" by the deadline, then the quality control supervisor is notified by email and must review the computer instead.

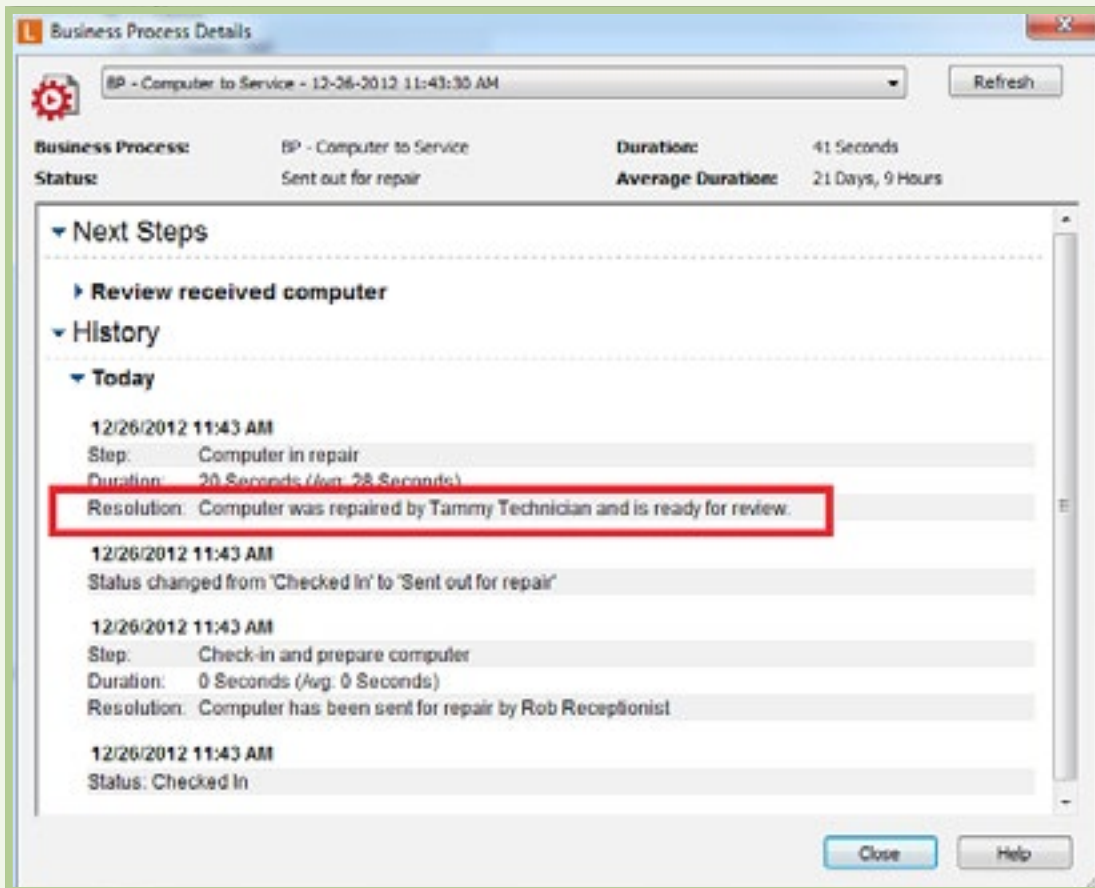


These same instructions will also show up in the Business Process Pane when the repair form is opened in the Laserfiche Client or Laserfiche Web Access.

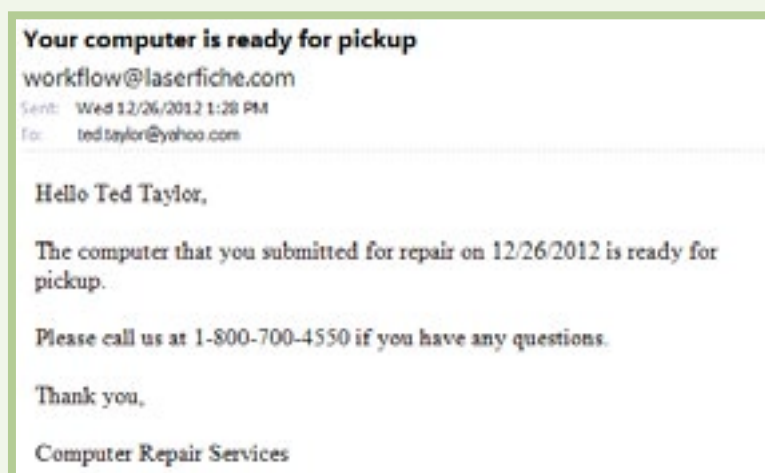




8. Once the quality control specialist reviews the computer he changes the value of the “Repair Status” field to either “Review – Not Fixed” or “Ready for Pickup.”
  - a. If the quality control specialist sets the status to “Review – Not Fixed,” the computer is sent back to the repair technician for further repair. The quality control specialist can easily view the business process details on the folder to see the technician who initially repaired the computer in order to follow up with him about the incomplete repair.



- b. If the quality control specialist sets the status to “Ready for Pickup,” Laserfiche Workflow will move the client’s folder into the “04 Pickup” folder and both the customer and the secretary will be automatically notified by email that the computer is ready for pickup.



9. Once the computer is picked up, the secretary changes the “Repair Status” to “Complete” and Laserfiche Workflow routes the folder to the archives. In the future, if the customer has an issue with the repair, the supervisor can quickly view the business process details to see the entire repair history of the computer in question.

The screenshot displays a window titled "Business Process Details" with a gear icon and a dropdown menu showing "BP - Computer to Service - 12-26-2012 1:19:38 PM (completed)". A "Refresh" button is located to the right of the dropdown. Below the dropdown, the following information is displayed:

<b>Business Process:</b>	BP - Computer to Service	<b>Duration:</b>	9 Minutes, 22 Seconds
<b>Status:</b>	Checked Out	<b>Average Duration:</b>	17 Days, 12 Hours

A "History" section is expanded, showing a list of events under the "Today" sub-section:

- 12/26/2012 1:29 PM**  
Status changed from 'Sent out for repair' to 'Checked Out'
- 12/26/2012 1:29 PM**  
Step: Check-out computer  
Duration: 46 Seconds (Avg: 46 Seconds)  
Resolution: This computer has been picked up on 12/26/2012
- 12/26/2012 1:28 PM**  
Step: Review received computer  
Duration: 1 Minute, 35 Seconds (Avg: 1 Minute, 34 Seconds)  
Resolution: Computer was reviewed by Riley Reviewer.
- 12/26/2012 1:26 PM**  
Step: Computer in repair  
Duration: 7 Minutes, 0 Seconds (Avg: 7 Minutes, 0 Seconds)  
Resolution: Computer was repaired by Tammy Technician and is ready for review.
- 12/26/2012 1:19 PM**  
Status changed from 'Checked In' to 'Sent out for repair'
- 12/26/2012 1:19 PM**  
Step: Check-in and prepare computer  
Duration: 1 Second (Avg: 0 Seconds)  
Resolution: Computer has been sent for repair by Rob Receptionist
- 12/26/2012 1:19 PM**  
Status: Checked In

At the bottom right of the window, there are "Close" and "Help" buttons.





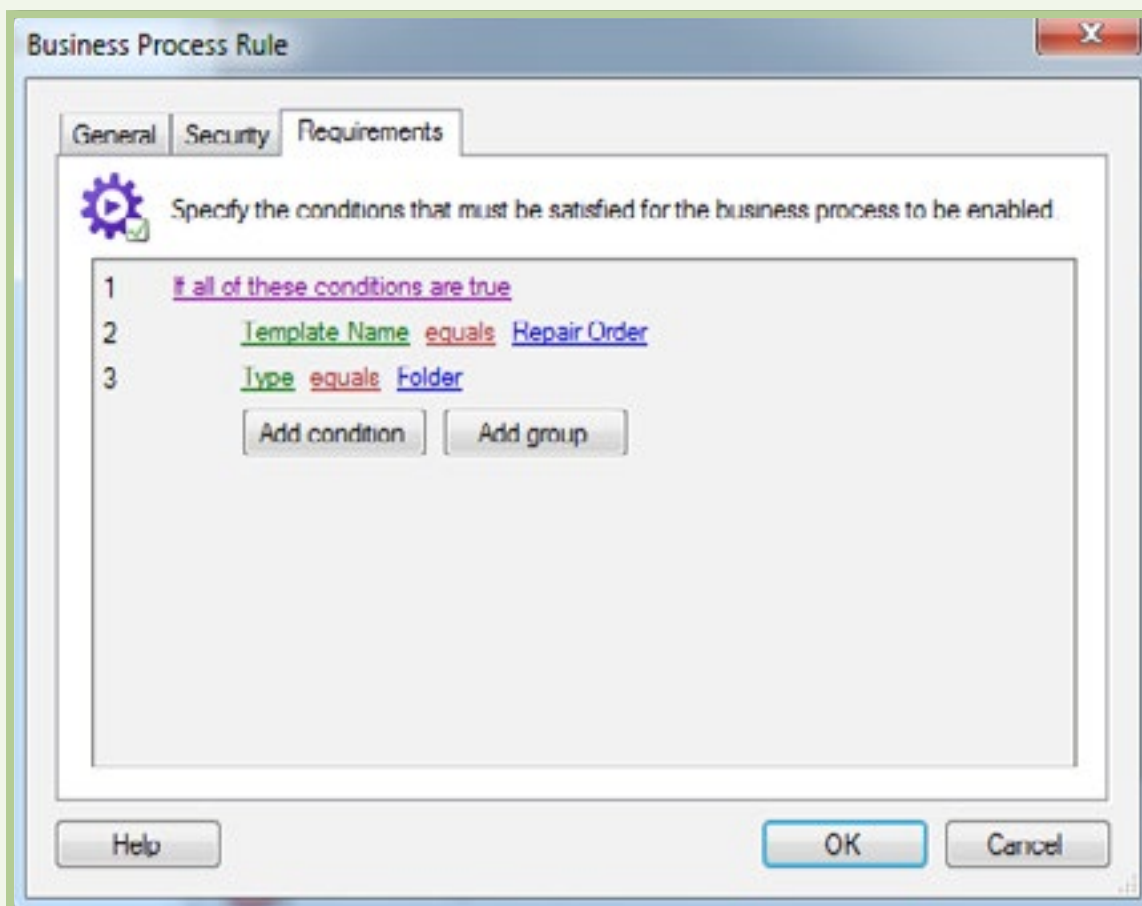
## WHAT HAPPENS BEHIND THE SCENES

The computer repair process is comprised of two separate workflows. The first workflow will automatically:

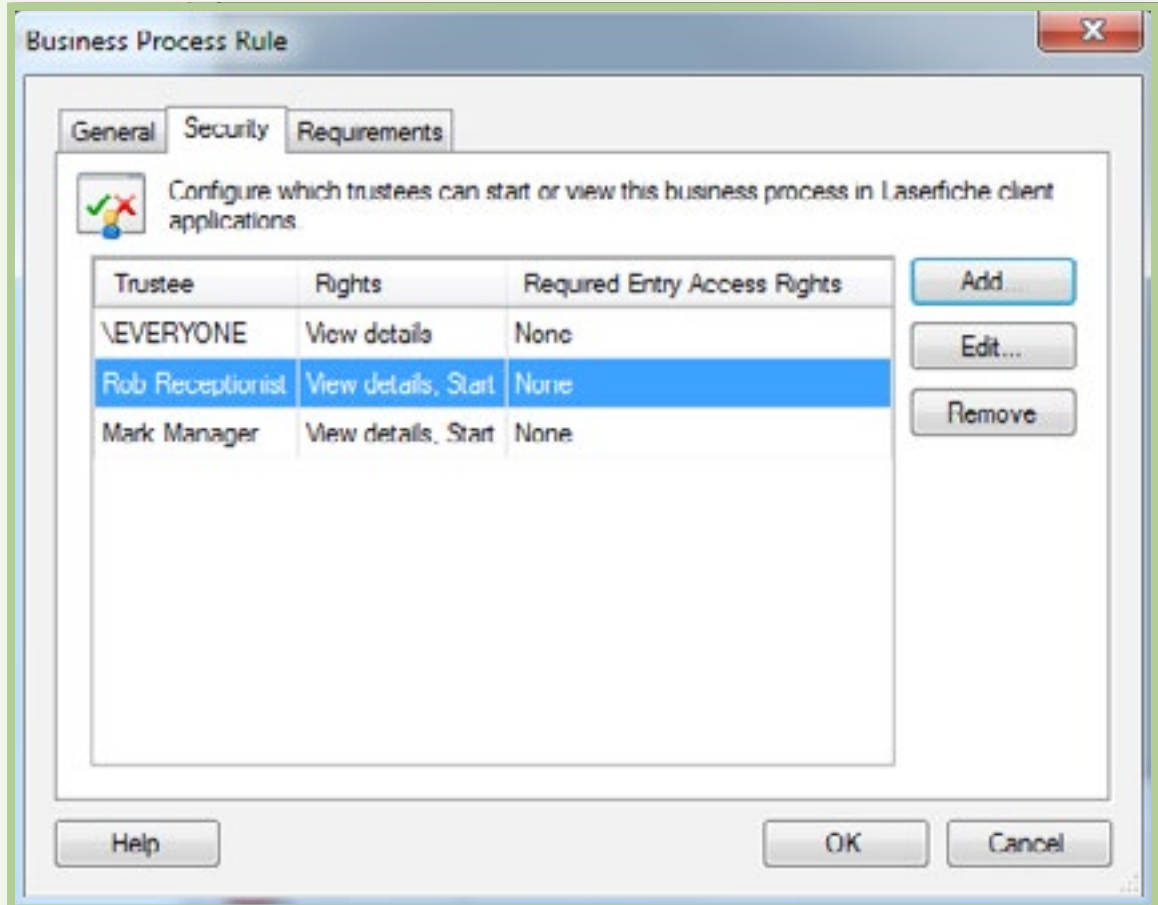
- ▶ Route the submitted form and photographs into a brand new folder in Laserfiche.
- ▶ Extract the form field values into tokens.
- ▶ Populate the document's, photographs' and folder's metadata.

The second workflow will be converted into a business process so that it can be integrated with users' daily tasks.

Once the secretary ensures that the computer is ready for repair, he manually launches this business process. In order to prevent this business process from being started on anything but a repair request, we've configured the starting requirements in the Laserfiche Workflow Rule Manager as follows:

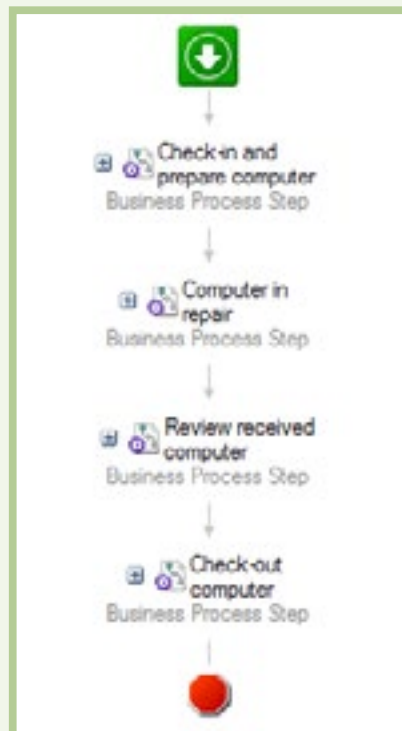


To prevent unauthorized users from launching this business process, we've configured security so that only the secretary and manager can launch it. Business processes can be started directly from the Laserfiche Client or Laserfiche Web Access, on a schedule, or using a condition starting rule. In this case, the business process is started manually by the secretary.

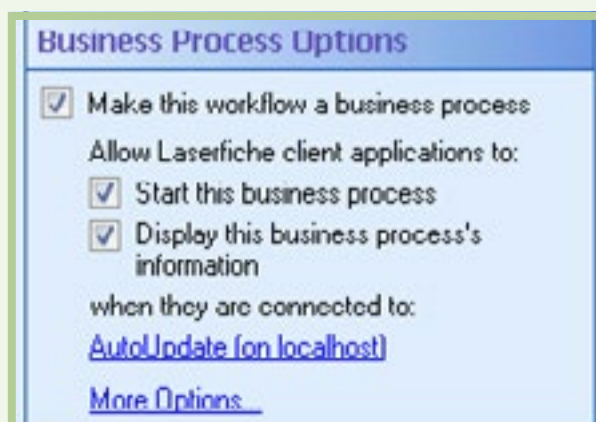




This business process is divided into four main steps, each of which is performed by a different person.



In order to turn a workflow into a business process, check the “Make this workflow a business process” option in the Laserfiche Workflow Designer.



Each business process step is a collection of activities (though the Business Process Step activity isn't required to contain other activities). For example, the "Check-in and prepare computer" business process step contains the following activities:

- ▶ Retrieve Field Values.
- ▶ Find Entries.
- ▶ Associate Entries.

When configuring a "Business Process Step" activity, you can specify:

- ▶ The step name.
- ▶ The participants: the users who should take part in this business process step.
- ▶ The due date: a guideline for the participants of by when they should complete the required task.
- ▶ User instructions: the text that will appear in the Business Process Pane prompting the participants on what they should do in this business process step.
- ▶ Resolution: information displayed if the task was completed before the due date as well as after the due date.



Properties

Check-in and prepare computer

**Activity Name**  
Check in and prepare computer

**Step Name**  
 Use the activity name  
 Use this name:

**Due Date**  
 Specify a reporting due date for this step  
 Due in:  
1  Day(s)  
0  Hour(s)  
0  Minute(s)  
 Exclude weekends and holidays  
 Due by:

**Step Instructions**  
**Instructions:**  
Fill our Repair Request form, take photos of computer and upload them using the same form.  
**Resolution:**  
Before due date:  
Computer has been sent for repair by %!(Checkinandpreparecomputer\_Repair Desk Secretary Display Name)  
After due date:  
Please speak to your supervisor about why this was delayed.

**Participants**  
[Hide Details](#)  
**Repair Desk Secretary**   
Trustee: Rob Receptionist  
 [Manage Roles...](#)

The “Associate Entries” activity allows the business process details to be displayed in a related entry’s Business Process Pane or Business Process Details dialog box. This activity allows users to view the same business process information on the actual repair request form as on the folder. (By default, the details only appear on the starting entry, in this case the folder.)

The screenshot displays a software interface with two main components. On the left is a business process diagram, and on the right is a 'Properties' dialog box for an activity.

**Business Process Diagram:**

- Step 1: Check-in and prepare computer (Business Process Step)
- Step 2: Retrieve Field Values
- Step 3: Get all extra documents (Find Entries)
- Step 4: Associate the form (Associate Entries) - This step is circled in red.

**Properties Dialog Box:**

- Title:** Associate the form
- Activity Name:** Associate the form
- Activity Description:** Associate Entries
- Entries:** A table listing associated entries.

Activity	Entry
Get all extra documents	Output Entries

Buttons: Add..., Remove

Warn if all entries have been removed from the business process

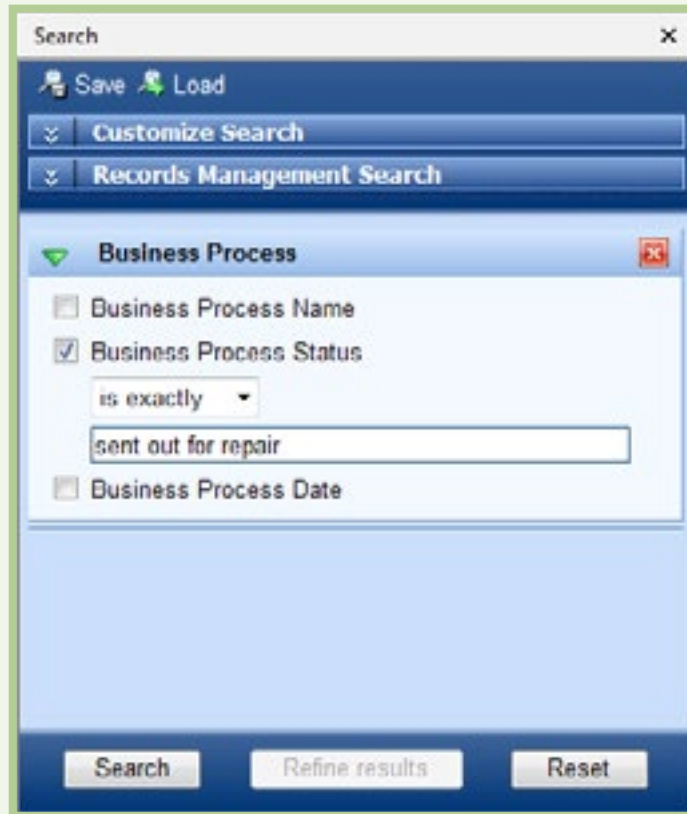


To keep the business process details up to date between the different tasks the users perform, and to allow specific searches in the Laserfiche Client based on the business process's status, use the "Update Business Process" activity.

The screenshot displays a business process flow on the left and a 'Properties' window on the right. The flow consists of four steps: 'Computer in repair' (Business Process Step), 'Move to 'In Repair' folder' (Route Entry to Folder), 'Status: sent out for repair' (Update Business Process), and 'Wait for status: 'Ready for Review'' (Wait for Entry Change). The 'Status: sent out for repair' step is circled in red. The 'Properties' window is titled 'Status: sent out for repair' and contains the following sections:

- Activity Name:** Status: sent out for repair
- Activity Description:** Update Business Process
- Options:**
  - Business Process Status:**
    - Do not change the status
    - Update the status to:
      - Field: Sent out for repair
  - Instance Name:**
    - Do not change the instance name
    - Rename the instance to:
      - Field: (empty)

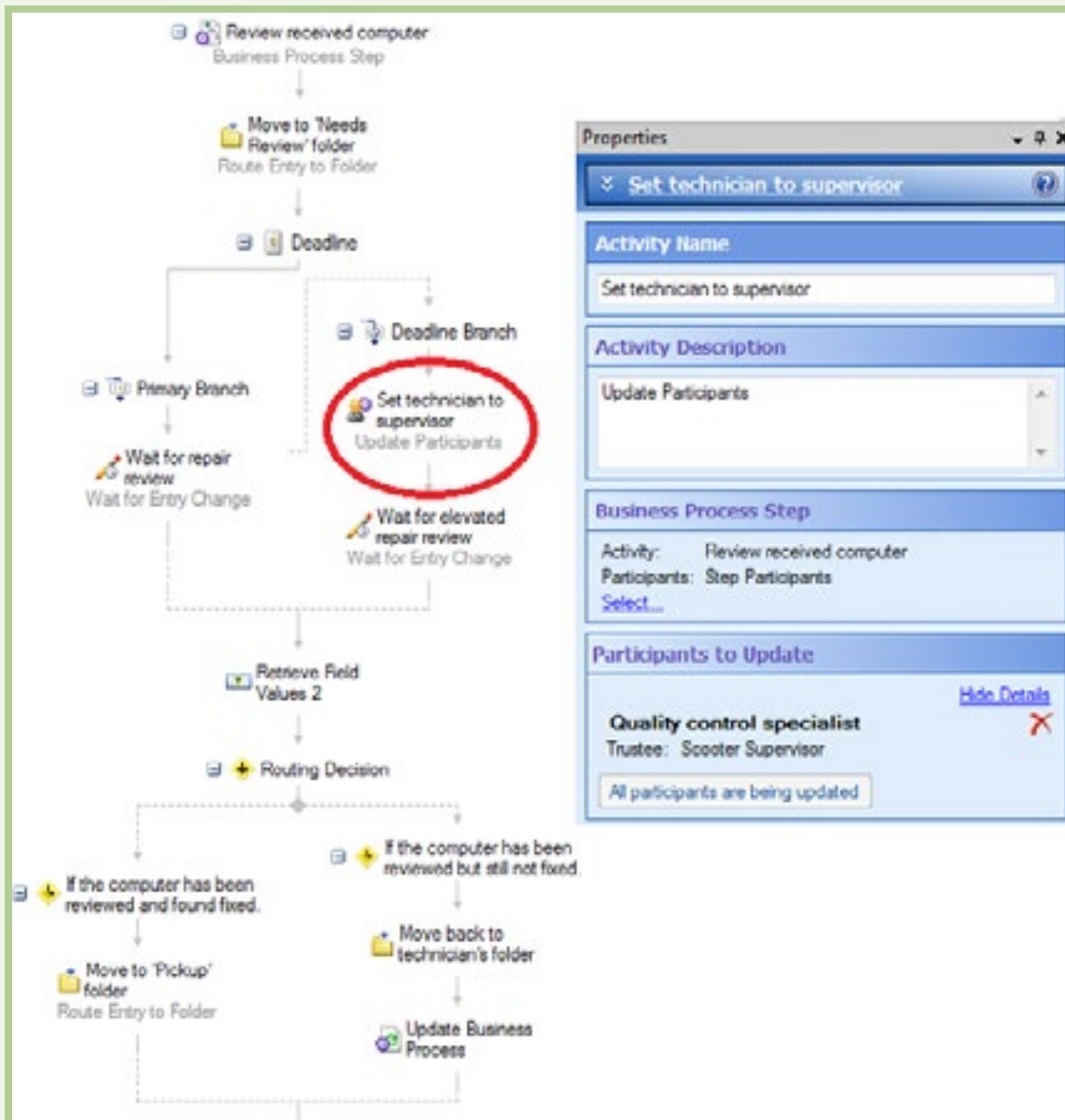
If at any time the repair shop manager wants to see how many computers are out to service, she can simply run a search in the Laserfiche Client for all business processes with the status “Sent out for repair.”



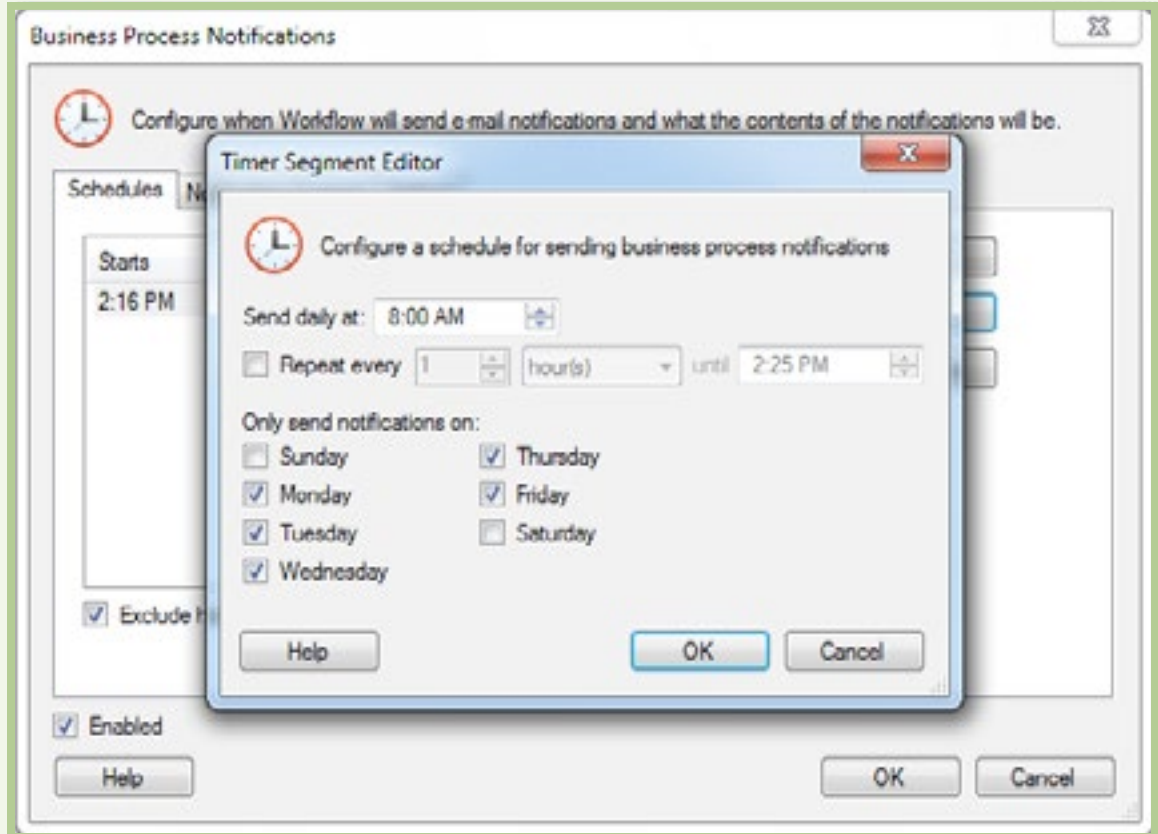




If the business process participant changes, as happens in the next “Review Received Computer” step when the quality control supervisor reviews the computer if the quality control specialist doesn’t do it by the due date, use the “Update Participant” activity. This allows Laserfiche Workflow to update the participant in a step for reporting purposes, notifications and displaying instructions. Here we are also using the “Deadline” activity in order to reassign the quality control to the supervisor if the specialist doesn’t accomplish what he needs in the allotted time.



To send notification emails to the technician and the quality control specialist whenever they have work pending, the Laserfiche Workflow Notification System is used. The timer in the Workflow Administration Console is configured to send one email at 8am daily (not including weekends) with work to be completed.





## **BENEFITS OF BUSINESS PROCESSES IN LASERFICHE WORKFLOW**

The advantages of Laserfiche Workflow business processes as opposed to regular workflows include:

- ▶ Users are provided with specific instructions for how to perform their particular tasks. Since employees regularly perform a large number and variety of tasks, this helps them remember what to do and reduces mistakes.
- ▶ Business processes can be launched directly from within the Laserfiche Client or Laserfiche Web Access, which means that tasks can be run on demand by regular employees.
- ▶ Managers are able to view how long each section of the business process took in the workflow instance details. They can locate delays and inefficiencies quickly in order to address issues as they arise.

# TASK ASSIGNMENT

**Job Functions:** Department Managers, Project Managers, Project Coordinators  
**Business Process:** Assigning Tasks

With the holiday season rolling around, many organizations and departments have an annual Secret Santa tradition. With dozens of people participating, such a process can include a lot of coordination. To demonstrate the capabilities of Laserfiche at a recent user group meeting, Chesterfield County automated the whole gift assigning process with Laserfiche Forms and Laserfiche Workflow.



*Michael Wells, System Administrator at Chesterfield County, VA, describes the workflows that power a Secret Santa process.*

## THE PROCESS IN A NUTSHELL

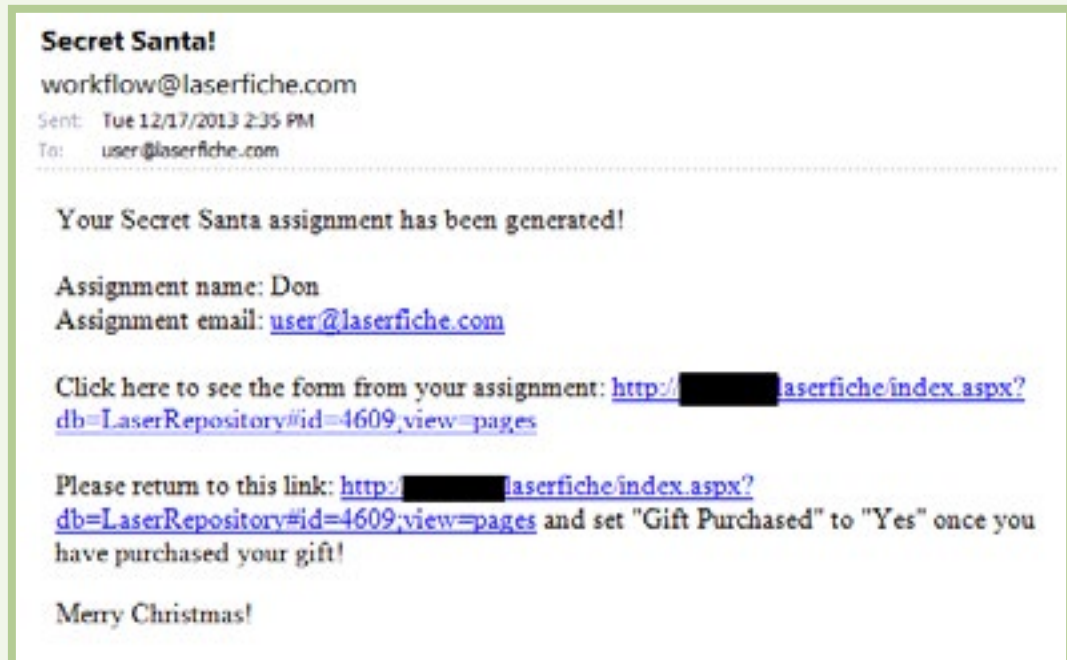
The Secret Santa process at Chesterfield County works as follows:

- ▶ Every employee who wishes to participate submits a Laserfiche Form that asks for their gift preferences.

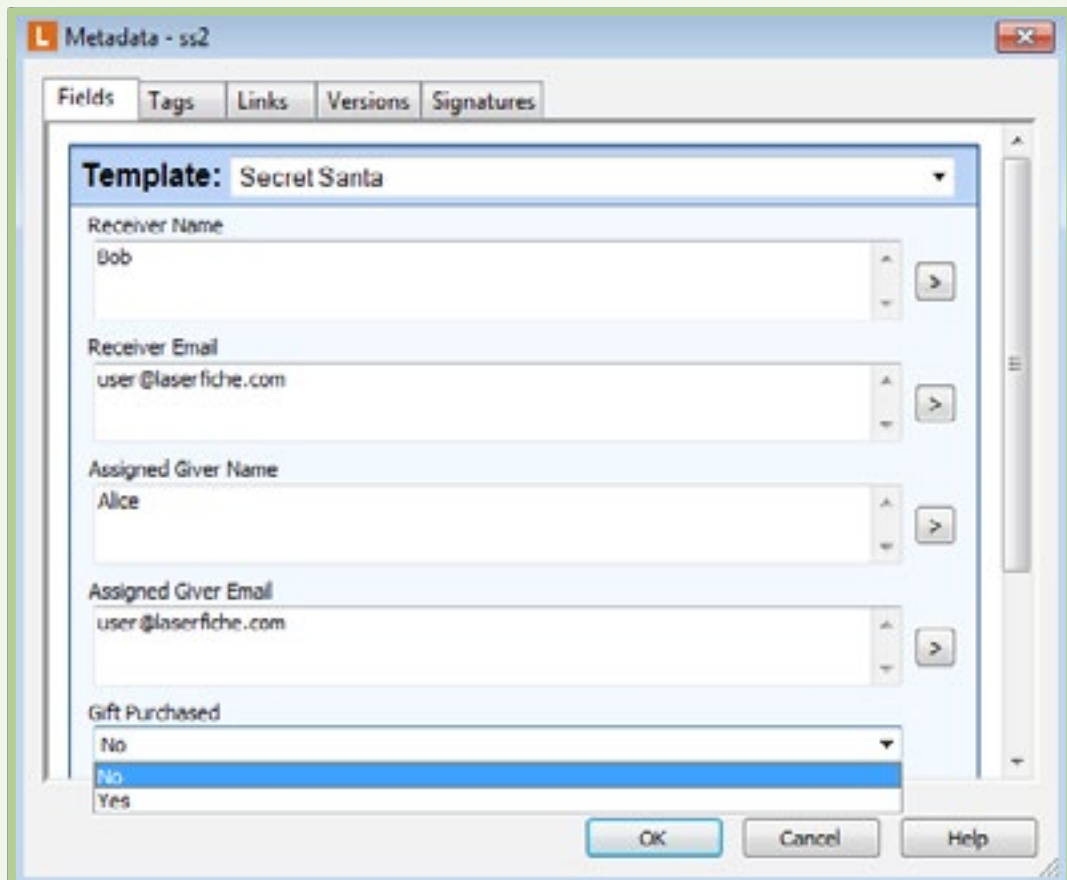
### Secret Santa!

Name *	<input type="text" value="Bob"/>
Email *	<input type="text" value="bob@test.test"/>
What's Your favorite food?	<input type="text" value="Spaghetti"/>
What do you do in your spare time?	<input type="text" value="Play tennis"/>
Who is your favorite author?	<input type="text" value="J.R.R. Tolkien"/>
What is your favorite band?	<input type="text" value="Rolling Stones"/>
What is your favorite color?	<input type="text" value="Purple"/>
Where do you like to shop?	<input type="text" value="K-Mart"/>
What is your favorite tv show?	<input type="text" value="Brady Bunch"/>
Where would you like to go on your dream vacation?	<input type="text" value="Tahiti"/>

- ▶ Once all participants have submitted the questionnaires, the Secret Santa coordinator starts a Laserfiche Workflow business process that randomly assigns a participant to each list.
- ▶ Each participant is notified by email of the person that they are assigned to purchase a gift for.



- ▶ Once the gift is purchased, the responsible person changes the value of the metadata field and the business process ends.





- ▶ If the gift isn't purchased in five days, the giver gets reminded by email.

**Stop Procrastinating!**

Laserfiche User <user@laserfiche.com>  
Sent: Wed 12/18/2013 10:19 AM  
To: user@laserfiche.com

---

You STILL haven't bought your Secret Santa gift! Hop to it, or you'll wake up on Christmas morning with two lumps of coal in your stocking!

As a reminder, here is the important information:

Assignment name: Don  
Assignment email: [user@laserfiche.com](mailto:user@laserfiche.com)

Click here to see the form from your assignment: [http://\[REDACTED\]laserfiche/index.aspx?db=LaserRepository#id=4609;view=pages](http://[REDACTED]laserfiche/index.aspx?db=LaserRepository#id=4609;view=pages)

Please return to this link: [http://\[REDACTED\]laserfiche/index.aspx?db=LaserRepository#id=4609;view=pages](http://[REDACTED]laserfiche/index.aspx?db=LaserRepository#id=4609;view=pages) and set "Gift Purchased" to "Yes" once you have purchased your gift!

Merry Christmas!

## WHAT'S GOING ON BEHIND THE SCENES

There are actually three separate Laserfiche Workflow business processes that run behind the scenes.

### Workflow 1

This Laserfiche Workflow business process does the following:

- ▶ Creates tokens that will be used to assign random gift givers to gift recipients. These tokens are used in the script later on in the workflow.
- ▶ Finds all submissions without any giver assigned.
- ▶ Uses a special Flag field to make sure that no one is assigned to purchase a gift for himself.
- ▶ Generates a random number using an SDK Script. This number is used to match the recipient to the giver.
- ▶ Populates the submission's metadata fields with the name of the assigned giver.

Here is what the script looks like. The tokens "maxrandom" and "randomnumber" must be created first with the Create Tokens activity.

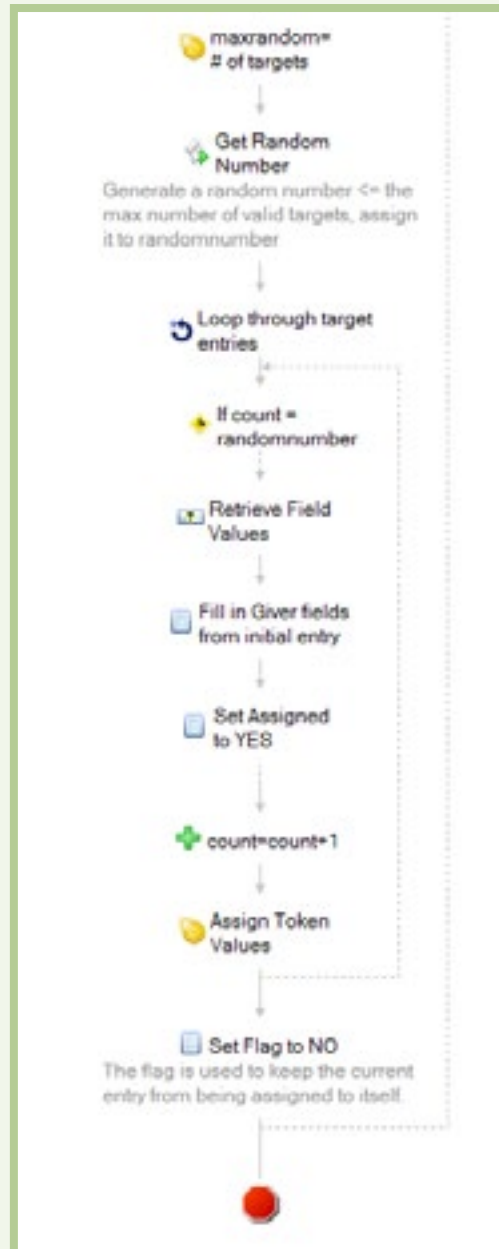
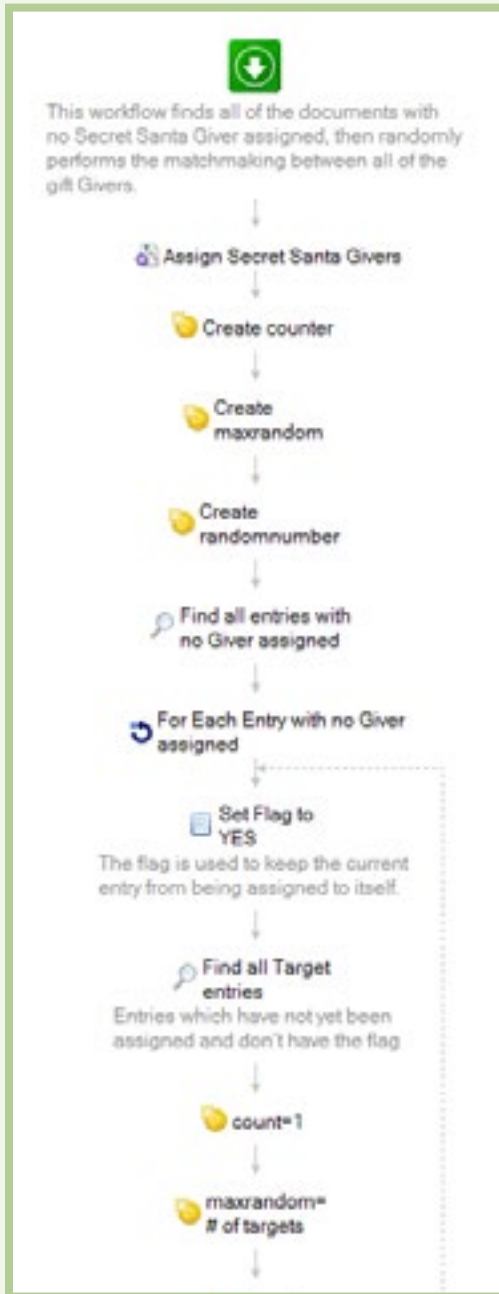
```
Imports System
Imports System.Collections.Generic
Imports System.ComponentModel
Imports System.Data
Imports System.Data.SqlClient
Imports System.Text
Imports Microsoft.VisualBasic
Imports LFSO90Lib

Namespace WorkflowActivity.Scripting.GetRandomNumber
    Public Class Script1
        Inherits SDKScriptClass90
        Protected Overrides Sub Execute()
            Randomize()
            dim MaxRandomInt as Integer =ME.GetTokenValue("maxrandom")
            dim randnum as Integer = Cint(Int((MaxRandomInt * Rnd()) + 1))
            Me.SetTokenValue("randomnumber", randnum)
        End Sub
    End Class
End Namespace
```



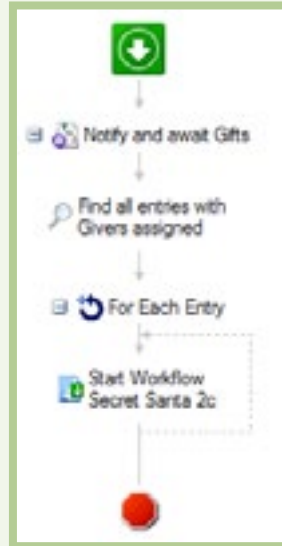


Here is what the whole workflow looks like:



## Workflow 2

Once all of the givers are assigned, this Laserfiche Workflow business process iterates through each submission and launches the third workflow, described below.

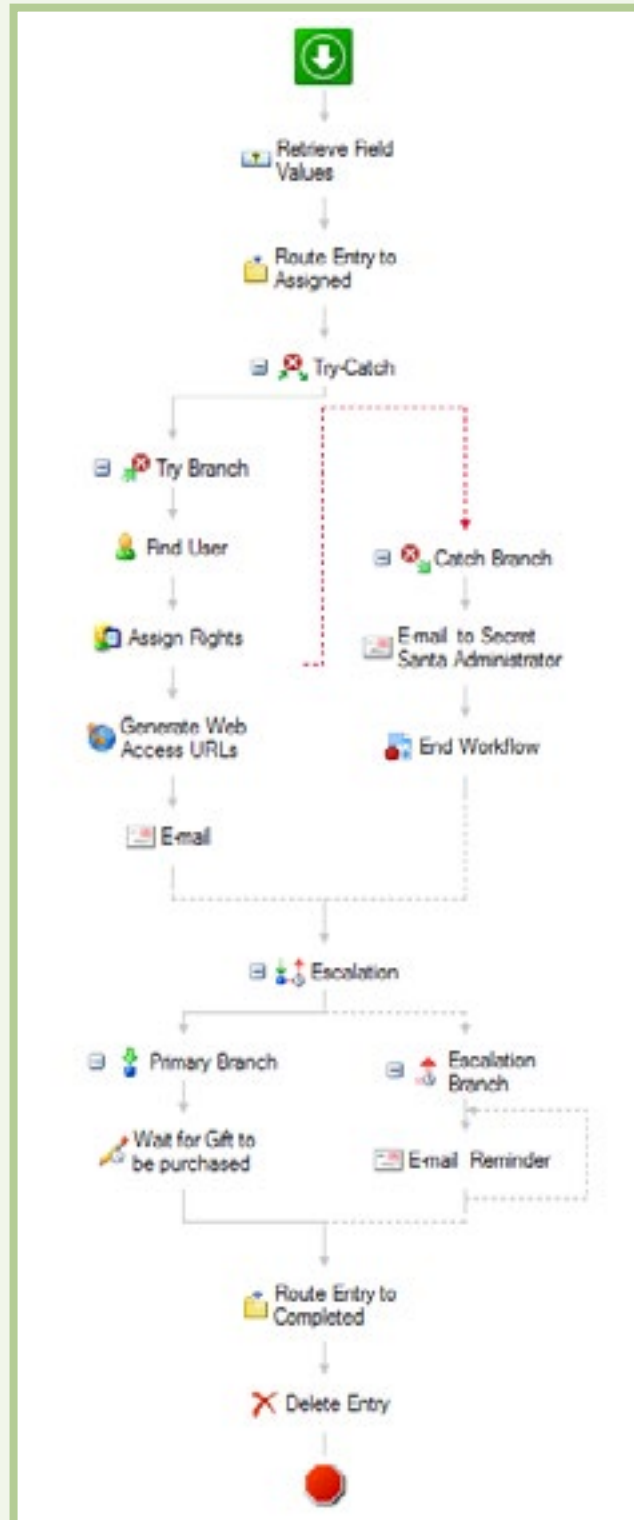




### Workflow 3

This workflow is responsible for the various notifications. First, it routes the submission to a brand new folder and then assigns Browse, Read and Write Metadata rights to the submission for the giver. It also emails the link to the submission to the giver. If the giver doesn't purchase a gift within five days, the workflow sends another email notification.

Here is what this workflow looks like:



## SOME THINGS TO KEEP IN MIND

Here are some things to keep in mind when setting up this process:

- ▶ Users participating in the Secret Santa exchange should already have accounts in Laserfiche or permissions configured through Windows groups. Laserfiche will assign the security to the folders it creates as necessary.
- ▶ To make the process less confusing to the user, the two fields used by Laserfiche Workflow, Doc Assigned and Flag, can be hidden from everyone but the Workflow user. Since users can only edit one field, they will know exactly what action they have to perform.

Current field access rights (required fields are in bold):

Field Name	Read	Create	Edit	Modify Field	Delete Field	Read Sec...
Assigned Giver Email	Allow					Allow
Assigned Giver Name	Allow					Allow
Doc Assigned						Allow
Flag						Allow
Gift Purchased	Allow	Allow	Allow			Allow
Receiver Email	Allow					Allow
Receiver Name	Allow					Allow



## **BENEFITS OF LASERFICHE**

Automating the gift assigning process with Laserfiche Forms and Laserfiche Workflow resulted in the following benefits:

- ▶ All of the forms are saved in a centralized place in the repository so there is a record of who is participating.
- ▶ No more pulling names out of a hat. Laserfiche Workflow will assign the givers to the recipients randomly and send them email notifications immediately.
- ▶ If employees forget to buy gifts, they'll continue to get emails until they do.

## QUICKER **BETTER** SAFER Laserfiche Forms

When solving business process problems, gaining fresh perspective from your peers can be invaluable. That's why Laserfiche encourages its customers to share concrete details (including screenshots) of their solutions to common problems with each other on the Laserfiche Solution Exchange.

This book is a collection of examples of how organizations can incorporate Laserfiche Forms into their business processes. With Laserfiche Forms, organizations can accelerate their business processes by simplifying data collection and processing—making entire business processes paperless from start to finish.

*“The ability to easily create forms and then deploy them within the organization is huge. Tie Laserfiche Forms into Laserfiche Workflow and the impact to an organization is significant.”*

– Pete Otholt, IT Administrator, Methodist Healthcare Ministries

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